# Looking to the future: Succession planning and recruitment in a volunteer-led organisation

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## Part 2 — Analysis

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*This Strategic Case Analysis (SCA) is the result of my own work. Material from the published or unpublished work of others, which is referred to in the SCA, is credited to the author in question in the text. The SCA is 7769 words in length. Research ethics issues have been considered and handled appropriately within the Durham University Business School guidelines and procedures.*

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# 1 Introduction

Like many volunteer run organisations the BGA focuses more on volunteer recruitment than on volunteer retention, and considers succession planning and other aspects of volunteer management a 'luxury [they] can't afford'(Manning 2019*a*)

The sudden death of the BGA President showed how risky a strategy this is, particularly for vital roles. They can no longer rely on suitable people just appearing when an important task needs doing, and will need to change their volunteer strategy in light of it.

This strategic case study analysis will review the literature on volunteer recruitment, volunteer retention, and volunteer management. Based on these there will then be a discussion of a number of analysis tools, before analysing the case and giving recommendations for both the BGA and for other organisations currently run on a similar basis.

# 2 Summary of challenges

The sudden death of the BGA President shows how easily a vital volunteer role can become unexpectedly vacant. The repercussions were made worse by a lack of HRM processes, notably succession planning. If the BGA had a successor ready to take over then the transition — while still painful on a personal level — would have been smoother on an organisational one.

Succession planning makes it necessary to have a pool of volunteers to fill vital roles. This requires both recruitment to bring them into the organisation, and retention to not lose them again over time. There is also a need for appropriate organisational leadership and management, including HRM.

# 3 Literature review

## 3.1 Organisational overview

Osterwalder & Pigneur (2010)'s Business Model Canvas is used widely for analysing organisations, in order to gain an overview of the way that different aspects of the organisation interconnect. There have been various authors that have adapted or extended the Business Model Canvas for use in contexts such as social or non-profit organisations (Müller 2012, Joyce & Paquin 2016, Vial 2019), due to the model's usual emphasis on cash flow and profit (Joyce & Paquin 2016, Coes 2014).

This case study analysis will not give a detailed overview of the literature for these, as the Business Model Canvas will only be being used to give the reader an overview of the organisation before entering an in depth analysis of the three core topics of Volunteer Recruitment, Volunteer Retention, and Volunteer Management.

## 3.2 Recruitment

In 2010, an estimated 22% of the adult population in the EU (over 92m) engaged in volunteer activities (GHK 2010). In many member states this

number was increasing (prior to the economic crisis), but in general organisations worldwide had already seen a steady decrease in volunteers (Brudney & Meijs 2009). In the UK, numbers of people volunteering at least once per year have dropped steadily by 6% over a 4 year period (2013/4–2017/8) (White 2018).

Brudney & Meijs (2009) suggest considering volunteers as a natural resource used by many organisations, such that all volunteer organisations should encourage people to volunteer whether or not for themselves. While long term this may improve things for everyone, it's unlikely to help short term.

People volunteer — or don't volunteer — for a number of different reasons. Clary et al. (1998) suggests 6 motives (the Volunteer Functions Inventory):

- Altruism ('Values')
- Wanting to learn ('Understanding')
- Social pressure ('Social')
- Career benefits ('Career')
- Protection from feelings of guilt ('Protective')
- Increasing self esteem ('Enhancement')

Each are realised to a different amount by different tasks, and each are desired by different amounts by each volunteer. Brudney & Meijs (2009) suggest that it's better to shape tasks to match available people than to try to find people to fit given tasks.

Dwyer et al. (2013) show positive correlation between volunteer satisfaction and the 'Value' and 'Enhancement' motives, and between volunteer contribution and the 'Understanding' motive, but negative correlation between volunteer contribution and the 'Enhancement' and 'Social' motives. They also show little correlation between volunteer satisfaction and volunteer contribution — happy volunteers are not necessarily productive.

Haski-Leventhal & Meijs (2011) discuss barriers to volunteering, and suggests that people may not volunteer because in some market segments volunteering has a negative or an 'uncool' image, not through a lack of altruism (this is more of a challenge in some countries than others (GHK 2010)). People are also more likely to volunteer if they can understand the cost/benefit balance. They split the major costs to volunteers into:

- Lost time
- Negative social reactions

- Psychological issues (eg burnout, stress, despair, anxiety)
- Financial costs
- Opportunity costs (things given up to volunteer)

NCVO (2019*b*) lists the top five reasons non-volunteers give for not getting more involved:

- 'I do other things with my spare time'
- 'I don't want to make an ongoing commitment'
- 'I have not been asked'
- 'I have work or study commitments'
- 'I have an illness or disability that I feel prevents me from getting involved'

Many authors advocate the use of social marketing to encourage people to volunteer — including to existing volunteers, to increase their commitment, satisfaction, and retention. Some marketing will inevitably be happening even if the organisation doesn't realise it (Haski-Leventhal & Meijs 2011).

Kotler & Lee (2016)'s 10 Steps for social marketing provides a useful framework for encouraging people to volunteer:

1. Describe the Plan Background, Purpose and Focus
2. Conduct a Situation Analysis
3. Select Target Audience
4. Set Behaviour Objectives and Target Goals
5. Identify Target Audience Barriers, Benefits, and Motivators and the Competition
6. Craft a Desired Positioning
7. Develop a Strategic Marketing Mix
8. Outline a Plan for Evaluation and Monitoring
9. Establish Budgets and Find Funding Sources
10. Complete an Implementation Plan

Haski-Leventhal & Meijs (2011) and Randle & Dolnicar (2009) agree that market segmentation is important for focusing effort, but Hustinx et al. (2010) suggest that this can lead to blocking potential volunteers who are not in traditional demographics — they are not approached, and lack of volunteer diversity may prove a barrier. If barriers to volunteering are removed, people are more likely to volunteer (Haski-Leventhal & Meijs 2011). Dwyer et al. (2013) and Stukas et al. (2008) say that marketing should be segmented to match a volunteer's motives from the Volunteer Functions Inventory, to give a consistent message that aligns with their goals.

Stukas et al. (2008) suggests that there should be different marketing to target people who are 'prone to volunteer' (who need signposting to ways in which they can volunteer), people who are 'open to good offers' (who need to be offered incentives and have their volunteering costs reduced), and people who are 'resistant to volunteering' (who would need to be coerced, such as through requiring a certain level of volunteering as part of achieving something). The latter are prone to negative opinions of volunteering, and are unlikely to do so in the future by choice.

### 3.3 Retention

Recruiting volunteers is only half of the battle. If no effort is put towards volunteer retention then an organisation can lose volunteers at the same rate that it gains them (whether through dissatisfaction or burnout) — this is a failing in many volunteer organisations (Brudney & Meijs 2009, Cuskelly et al. 2006, Taylor et al. 2006).

One way that volunteers can become dissatisfied is through a break in the psychological contract. This can be more difficult in volunteer organisations, where leaders and volunteers may have drastically different views on the nature of the volunteering. This sometimes stems from the fact that leaders often have more experience managing paid employees, who have different expectations to volunteers (Taylor et al. 2006).

A good match between the expectations of the volunteer and the organisation leads to greater satisfaction, commitment, and likelihood to continue (Scherer et al. 2016). Stukas et al. (2008) say that volunteers doing tasks that match their motives for volunteering (from the Volunteer Functions Inventory) are more likely to be satisfied and to continue, particularly if they match on multiple motives.

Volunteers want to feel that their contributions are valued, particularly when they have more control over their contributions. Taylor et al. (2006) notes that greater perceived value of contributions leads to greater perceived obligations. Posner (2015) mentions that greater empowerment leads to greater commitment, and that volunteers in leadership positions become more attached to their organisations, although this may instead be people who are more attached being more likely to accept leadership positions.

Burnout can be a significant problem for volunteers, with physical, emotional, and mental symptoms ranging from exhaustion to cynicism and depersonalisation, and eventually to quitting the organisation (Scherer et al. 2016).

Volunteers will often believe that there's no one to take their place if they stop, and the organisation would be unable to continue. The role becomes a chore, and leads to burnout (Taylor et al. 2006). NCVO (2019*b*) reports that 1 in 5 volunteers feel that volunteering is becoming too much like paid work.

Scherer et al. (2016) describe volunteer effort in terms of conservation of resources, where each volunteer has limited resources which can be affected by situations. In particular a poor person / organisation fit leads to greater strain, which causes burnout, which in turn creates intention to quit.

Stukas et al. (2008) recommends that organisations are upfront about the costs involved in volunteering, to reduce the risk of disenchantment.

Dwyer et al. (2013) suggest that to increase volunteer satisfaction it's important to emphasise how volunteering helps others, and positive feelings gained from volunteering. To increase volunteer contribution, however, it's important to emphasise the learning opportunities.

This leads to the question of what an organisation wants out of its volunteers — and how it should split resources between the sometimes contradictory objectives of pleasing volunteers and furthering the organisation's aims. Scherer et al. (2016) find that volunteers' satisfaction is not correlated to their intentions to continue volunteering, and Dwyer et al. (2013) find no correlation between volunteer satisfaction and contribution. It could be argued, then, that volunteer satisfaction is not a useful metric.

### 3.4 Management

Many volunteer organisations produce a variety of material for the management of volunteers, such as volunteer handbooks, job application packs, and codes of conduct (NCVO 2019*a*).

Taylor et al. (2006) describes 'widespread evidence on the value of HRM' for volunteer management, but a lack of practice in many organisations. Cuskelly et al. (2006) investigated the use of HRM planning practices in volunteer sporting organisations, and found that — while there was only a 'tenuous link between HRM practices and organisational outcomes' — there was evidence that HRM practices led to fewer perceived problems in volunteer retention.

Frost & Laing (2015) researched governance (including succession planning or lack thereof) in festivals — notably volunteer-run rural festivals that receive some assistance from their local council, in a similar way to the locally run Go tournaments that receive assistance from the BGA. They note that succession planning is often a major issue, but one that very few com-

| | Low cost | High cost |
|---|---|---|
| High quality | Type A task | Type B task |
| Low quality | Type C task | Type D task |

Table 1: Haski-Leventhal & Meijs (2011)'s Volunteer Matrix

mittees are willing to discuss, and one which is not often dealt with in a systematic way.

Documenting procedures can help with continuity as a minor form of succession planning (Frost & Laing 2015, Ragsdell & Jepson 2019), codifying and sharing tacit knowledge — for example by creating a manual to let new volunteers know what needs doing. This ties in with a need for in depth role descriptions, to help people to get up to speed as quickly as possible.

One major barrier to documenting procedures, sharing knowledge, and for succession planning in general is that it takes time and becomes an additional task that needs to be completed — volunteers can find that it's 'quicker to do the job themselves than show someone else how to' (Ragsdell & Jepson 2019, Wolfred 2008). Succession planning is important from a risk management perspective, as the loss of a senior figure can seriously destabilise an organisation (Wolfred 2008).

Haski-Leventhal & Meijs (2011) made use of a perceptual map (a 'Volunteer Matrix'), with quality of experience vs volunteer cost (in terms of time, money, effort, etc) to split volunteer tasks into four types (see Table 1) — each of which should be recruited for and managed differently:

- A (high quality, low cost) — often many candidates, requiring a selection process, and well suited to people who are otherwise busy
- B (high quality, high cost) — better for volunteers with more resources, such as younger volunteers with more free time
- C (low quality, low cost) — usually short term, episodic volunteers
- D (low quality, high cost) — best avoided where possible, usually by incentivising and motivating to make Type D tasks into higher quality Type B tasks

Stukas et al. (2008) describes volunteering in terms of an exchange of benefits between the volunteer and the organisation, and recommends giving benefits and incentives that match the volunteer's motives under the Volunteer Functions Inventory.

Many authors (Posner 2015, Catano et al. 2001, Dwyer et al. 2013) discuss the importance of transformational over transactional leadership in volunteer organisations — partly due to the lack of available punishments and

rewards. Volunteer leaders need to act as role models for the organisation (Dwyer et al. 2013), and it can be hard for a leader to push organisational changes as there is often reluctance to change (Hay et al. 2001).

Posner (2015) believes volunteer commitment levels are based on leadership quality. Dwyer et al. (2013) say that while leadership leads to volunteer satisfaction it doesn't necessarily lead to volunteer contribution — but Posner (2015) argues that volunteers need both to be motivated to contribute while also gaining satisfaction so they stay with the organisation. He also suggests that volunteers are more likely to stay if they are empowered to take on leadership tasks.

Multiskilling is a process, more commonly seen in Japanese companies than in the West (Carmichael & MacLeod 1993), to ensure that multiple members of a team are able to undertake any given task — both to increase flexibility and to mitigate the risk of one person being unavailable with no one else able to take over their responsibilities (Kaul 2006). This involves splitting roles into activities and where necessary training people to do things outside their normal role. The flexibility from shared roles can make jobs more manageable (Wolfred 2008).

Cuskelly et al. (2006) and Mutawa (2015) analyse five Management Practice Constructs, measured using the Volunteer Management Inventory:

- Planning
- Recruitment
- Training / Support
- Recognition
- Performance management

(Cuskelly et al. (2006) also include Screening and Orientation as additional constructs). Mutawa (2015) reports that use of these five has a statistically significant correlation to volunteer Retention, Motivation, and Satisfaction.

Despite the advantages of HRM, Taylor et al. (2006) warn that management practices can be hard to introduce in fully volunteer led organisations as the administrators are also volunteers. Cuskelly et al. (2006) recommends not forcing HRM in a rigid manner, as volunteer organisations tend to be less comfortable with bureaucracy.

# 4 Analysis

As discussed previously, the BGA faces two main classes of problem arising from the death of its President — the immediate issue of finding someone to take on his roles within the organisation, and the longer term strategic

| Section | Framework | Author |
|---|---|---|
| General overview | Business Model Canvas | Osterwalder & Pigneur (2010) |
| Recruitment | Volunteer Functions Inventory | Clary et al. (1998) |
| | Market segmentation, social marketing | Stukas et al. (2008) |
| Retention | Conservation of Resources | Scherer et al. (2016) |
| | Management of expectations | Taylor et al. (2006) |
| Management | Volunteer Management Inventory | Cuskelly et al. (2006) |
| | Volunteer Matrix | Haski-Leventhal & Meijs (2011) |

Table 2: Choice of analytical tools

issue of ensuring succession planning is undertaken for all key roles as risk mitigation.

In order to prevent future problems with succession planning the BGA will need to deal with three main sub issues — recruitment, retention, and management.

### 4.1 Choice of analytical tools

The primary analysis frameworks being used are outlined in Table 2.

While various aspects of the literature will be referenced, the following analysis of the BGA case study — split into volunteer recruitment, volunteer retention, and volunteer management — will focus predominantly on six analysis frameworks.

- Recruitment will make use of the Volunteer Functions Inventory (Clary et al. 1998), and market segmentation for social marketing (Stukas et al. 2008)
- Retention will make use of Conservation of Resources (Scherer et al. 2016), and management of expectations (Taylor et al. 2006)
- Management will make use of the Volunteer Management Inventory (Cuskelly et al. 2006), and the Volunteer Matrix (Haski-Leventhal & Meijs 2011)

Before examining these three elements individually, we will consider a Business Model Canvas (Osterwalder & Pigneur 2010) to gain a brief overview of the organisation.

### 4.2 Limitations in the BGA survey dataset

Much of the data is taken from a survey of BGA members, as referenced in the case study. This survey was circulated electronically to the BGA's mailing list, to players at UK tournaments, and to members of various British Go clubs.

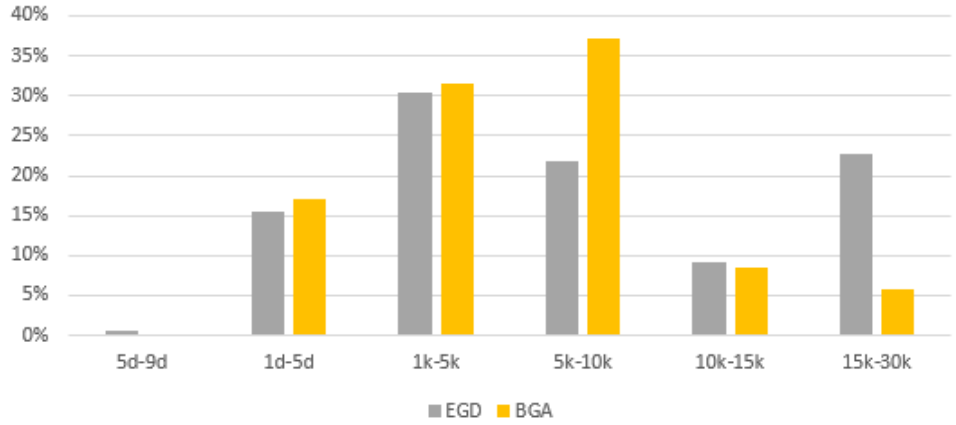


Figure 1: Comparison between ranks from the BGA survey and from UK tournament entries in the European Go Database

Only 16% of respondents do not currently volunteer and have never volunteered in the past. This may be due to an inherent bias in the data, as the sort of people who agree to fill in questionnaires may be correlated to the sort of people who volunteer.

Several of the comments in the report are negative. This may in part be due to people being more likely to give negative comments than positive ones, as they are more likely to notice and comment on things that are not done than things that are.

84% of respondents are BGA members, which equates to 7% of all BGA members (Kirkham 2019). The ranks for respondents for the most part follow the spread of ranks for UK tournament entries (EGD 1996–2019) (however with fewer results from the weakest grouping — see Figure 1).

The demographics from the survey also largely match the data for the UK from an international survey of national Go associations (IGF 2016). The main difference is a lower number of Youth players (under 18s) — which is to be expected, as they are less likely to have received the survey.

Based on these, and despite the aforementioned potential limitations and bias, the data can be considered to be representative and the results used as a basis for analysis — comparing where possible against other sources to allow triangulation. The BGA may wish in the future to undertake further research with a greater sample size to explore any of this paper's findings in more detail.

### 4.3 Business Model Canvas

Looking at the Business Model Canvas (see Figure 2), the main thing to note is that the Key Resources are dominated by Volunteers. As such, this

Figure 2: Business Model Canvas for the BGA

is the resource that the BGA should be putting most work into trying to retain, particularly as it's the resource that is most likely to fluctuate over time.

The volunteers also appear in a circular way both as a Key Resource and as a Customer Segment, because a lot of the BGA's work is in supporting volunteers (both internally and externally).

Volunteers are central to everything that the BGA does. As such, a disruption in the supply of volunteers (either the number or the skill set) will have a detrimental effect on the quality and availability of Key Activities. An increase in volunteers, however, would reduce the individual volunteer workload.

Channel reach is low amongst non-Go players, who are unlikely to see any of the channels unless they attend an outreach event. The BGA already looks to increase its range of channels for non-Go players, both in terms of the types of events it attends for outreach, and with things like Go problems in newspapers.

The BGA is in danger from competition, from two main sources. The first is from other potential hobbies. While customer satisfaction is currently positive (if a little low), the Value Proposition is under threat — particularly when recruiting players, who could easily go elsewhere.

The second threat is from technology. It's now much easier to play Go online or against computers. The BGA's Value Proposition, built around playing in person in clubs and tournaments, may not appeal as strongly with some market segments.

One element — outreach — is a popular reason for supporting the BGA, despite it not benefiting members directly. The BGA should advertise its outreach activities to the customer segment who plays mainly online or against computers, who may decide to support it through joining or volunteering.

The BGA is a volunteer run organisation for furthering the playing of Go in the UK. As such, the financial side — while important — is a means to an end rather than the main driver for the organisation. It may be of interest to repeat the Business Model Canvas with respect to volunteer time, instead of financial cost.

Revenue streams are reasonably diversified, sustainable, and recurring, with strong margins (thanks to recent sponsorship) — but they're dominated by sponsorship from a small number of sponsors (5 sources in 2017 (*Treasurer's Report* 2017)), which is an unpredictable stream. Costs are largely predictable, with the notable exceptions of Outreach and Teaching events.

While it should be recommended that the BGA diversifies its sponsorship portfolio to mitigate future risk, funds are not currently a barrier for volunteers.

## 4.4 Recruitment

### 4.4.1 BGA membership and volunteering

In order to increase the overall number of volunteers, the BGA will either need to increase the proportion of Go players that volunteer, or increase the number of Go players.

Note that this is the number of Go players, not necessarily the number of BGA members. The BGA gains many advantages through having a large membership — mainly by improving its financial and political power — but from a volunteering point of view the statistics from the membership questionnaire show no correlation between volunteering and BGA membership. People volunteer just as much whether or not they are BGA members.

This lack of correlation implies that there is a disconnect between the reasons that people volunteer and the reasons that people join the BGA. BGA membership levels have been stable for a number of years, but while there is clear support for its aims (and for British Go in general) it may find itself in difficulties if it does not address this disconnect and encourage more volunteers to become members — either through better advertising the good work that it already does, or by doing more in areas that people are interested in. (This is covered in more depth later in the report).

Another aspect of this concerns the BGA members who do not currently volunteer. One way in which the BGA could encourage greater participation from existing members specifically (in addition to the general recruitment described later in this section) could be to develop an 'enhanced' membership level, with benefits only available to people who have volunteered for the organisation (Stukas et al. 2008). While this may increase people's incentives to volunteer, it would have a number of potential implementation issues — including quantifying the amount of volunteering that people do, avoiding the perception of a 'clique' giving itself benefits, and the fact that people volunteering purely for a return (based on tangible benefits) are less likely to contribute as much as those who do it for the volunteering's own sake (Dwyer et al. 2013).

### 4.4.2 Reasons for volunteering

The BGA survey covers the same questions as Clary et al. (1998)'s Volunteer Functions Inventory. Most volunteers score most highly for the Values motive (on average 72%), showing that they volunteer mainly for altruistic reasons. After this Enhancement, Understanding, and Social are all at a similar level (41-45%) — volunteers want to learn, fit in with others, and feel better about themselves. Below these are Protective (21%), then Career (much lower, at 10%), which is to be expected — Go volunteering is unlikely to be a stepping stone for professional work.

Dwyer et al. (2013) showed positive correlation between volunteer satisfaction and the 'Value' and 'Enhancement' motives. These are the highest two motives, and this is borne out by the high quality ratings for most of the volunteer roles.

They also showed positive correlation between volunteer contribution and the 'Understanding' motive, and negative correlation between volunteer contribution and the 'Enhancement' and 'Social' motives. These are all at similar levels.

While volunteer satisfaction is good, volunteer contribution is in some respects more important. Dwyer et al. (2013) recommended emphasising the learning opportunities of volunteering to increase volunteer contribution by encouraging the recruitment of people with the right motives.

### 4.4.3 Barriers to volunteering

Under 40% of non-volunteers believe that their personality is similar to the BGA's typical volunteers. This only raises to 50% amongst volunteers. One barrier to overcome, then, might be a negative perception of BGA volunteers — although the joint lowest reason given for not being more involved in volunteering was that 'the other volunteers aren't like me', so perhaps the variety isn't offputting.

When asked specifically about barriers to tasks in the BGA survey the greatest response was time or other external pressures, followed by a perceived lack of support from either the BGA or from other volunteers when needed. These could be considered as two sides of the same problem — if people had increased support to reduce their workload then external pressures may not have been as important to them. This does, of course, require sufficient volunteers to be able to offer this support.

Time or other external pressures was also by far the top reason given for not volunteering more (evenly across volunteers and non-volunteers). This matches the top two reasons from the NCVO (2019*b*) survey, representing over 50% of respondents. People will be more likely to offer to volunteer if they are able to fit it around their already busy lives. It is therefore recommended that the BGA makes sure that potential volunteers understand the amount of work required for a given role — not to put them off, but to allow them to understand how well they can fit it around their other commitments (Stukas et al. 2008).

The second highest reason for not volunteering more was not being sure what could be done to help. This was far higher from non-volunteers than volunteers, and implies that a reasonable number of people would be willing to volunteer if they were asked (either directly or indirectly).

When asked why they started volunteering, most (55%) were directly asked to help, followed by people who noticed a specific need (19%). Respondents also said that they would be on average 10% more likely to help if

| Segment | Segment size | Problem incidence | Problem severity | Reachability | General responsiveness | Incremental cost | Total[1] |
|---|---|---|---|---|---|---|---|
| Values | 7 | 2 | 6 | 4 | 6 | 5 | **29** |
| Understanding | 3 | 1 | 7 | 4 | 5 | 6 | **26** |
| Social | 3 | 1 | 0 | 4 | 4 | 1 | 13 |
| Career | 0 | 0 | 4 | 4 | 1 | 3 | 12 |
| Protective | 1 | 0 | 4 | 4 | 2 | 3 | 14 |
| Enhancement | 3 | 1 | 1 | 4 | 3 | 2 | 14 |

Table 3: Segmentation ranking based on the Volunteer Functions Inventory

asked than if they just noticed a problem. This ties in with NCVO (2019*b*), where being asked directly was listed as a major factor in encouraging people to start volunteering.

Based on this, it is recommended that the BGA asks people to volunteer more often — whether directly for a particular role, or more generally through social marketing.

#### 4.4.4 Segmentation for social marketing

Kotler & Lee (2016) give a good framework for social marketing through their Ten Steps. The first two of these — the background to the plan and the situation analysis — have already been covered earlier, and some of the later steps will require more in depth analysis and decision by the BGA and so are outside the scope of this report. It will, however, be of interest to examine options for market segments and associated barriers, benefits, and motivators.

To select the target audience, the BGA will need to segment the market. There are various factors that can be used for segmentation, but Dwyer et al. (2013) and Stukas et al. (2008) recommend segmenting based on the Volunteer Functions Inventory. Table 3 gives the six motives with rankings from a selection of Andreasen (2002)'s seven evaluation criteria. Segment size and problem incidence are taken from the BGA survey results. Problem severity and incremental cost are based on Dwyer et al. (2013)'s correlation between volunteer satisfaction and the 'Value' and 'Enhancement' motives, between volunteer contribution and the 'Understanding' motive, and negative correlation between volunteer contribution and the 'Enhancement' and 'Social' motives. Reachability is constant as the BGA's marketing channels are likely to reach each segment the same amount. General responsiveness orders the motives by how closely they match the volunteering tasks.

[1]For the purposes of segmentation, the defencelessness, marketing responsiveness, and organisational capabilities criteria have all been removed from the calculation, as they are likely to (respectively) be covered by other criteria, unknown at this stage, or identical for

The two motive segments that score the highest are Values (people who want to help others in an altruistic way) and Understanding (people who want to 'gain greater understanding of the world, the diverse people in it, and ultimately oneself' (Stukas et al. 2008)).

Randle & Dolnicar (2009) found that people with more motives contributed more. From the BGA survey, 61% had more than one motive. All people with more than one motive included Values, and most (68%) included Understanding.

There are many other criteria that could also be used to segment the market. Three of these — age, rank, and years playing — are given in Table 4.

The majority of non-volunteers in the survey are relatively young (less than 30), relatively weak (10k or weaker), and have been playing for a relatively short period (less than 5 years). Indeed, no non-volunteer had been playing for more than 5 years. These three are all groups which are important to recruit as they should become the older, stronger players of the future.

While there is a correlation between the three groups (young people can't have been playing for very long, and people who haven't been playing for long are more likely to be weak), this is relatively weak (with values ranging from 0.20 to 0.47).

This gives us five market segments for the BGA to investigate:

1. People who want to help others
2. People who want to learn and gain understanding
3. People aged under 30
4. People weaker then 10k
5. People who learned Go within the last 5 years

The target goal for all segments will be to both increase the number of times that people volunteer, and also to make people think of themselves as being potential volunteers, so that when help is needed they will put themselves forward without being asked directly.

There will be overlap between segments 1–2, dealing with players' motivations, and segments 3–5, segmenting using demographics. For the most part, the BGA can use the first two segments to analyse segment motivations and the remainder to analyse segment barriers.

Segment 1 will be motivated by the knowledge that the work they do is helping others in an effective way. Advertising should therefore focus on

all segments

[2]In order of strength from weakest to strongest: Double Digit Kyu, Single Digit Kyu, Dan player

| Segment | Segment size | Problem incidence | Problem severity | Reachability | General responsiveness | Incremental cost | Total[1] |
|---|---|---|---|---|---|---|---|
| Age: | | | | | | | |
| <30 | 2 | 6 | 4 | 5 | 6 | 6 | **29** |
| 30–45 | 2 | 2 | 4 | 5 | 4 | 5 | 22 |
| 45–60 | 1 | 3 | 4 | 5 | 4 | 4 | 20 |
| 60+ | 3 | 1 | 4 | 5 | 6 | 4 | 23 |
| Rank:[2] | | | | | | | |
| DDK | 1 | 5 | 6 | 4 | 5 | 6 | **26** |
| SDK | 5 | 1 | 4 | 5 | 5 | 4 | 23 |
| Dan | 1 | 0 | 6 | 5 | 5 | 5 | 22 |
| Years playing: | | | | | | | |
| <5 | 2 | 5 | 6 | 4 | 5 | 6 | **27** |
| 5–15 | 2 | 0 | 4 | 5 | 4 | 4 | 19 |
| 15–35 | 2 | 0 | 4 | 5 | 4 | 4 | 19 |
| 35+ | 2 | 0 | 4 | 5 | 4 | 4 | 19 |

Table 4: Segmentation ranking based on age, rank, and number of years playing Go

things such as the number of people who could be introduced to the game through helping with an outreach event, or the benefits that they could bring to the membership through holding a BGA council position.

Segment 2 will be motivated by the knowledge that by volunteering they will be able to learn. Advertising should therefore focus on things like the additional skills that they could achieve through volunteering — whether Go related (such as getting stronger by teaching weaker players) or more transferable (such as planning large events, leading a team, or public speaking).

Barriers to volunteering have already been discussed, but there are some barriers that will be more specific to certain segments.

Segments 3–5, while separate, will share some common barriers and motivators. One major barrier is likely to be perceptual, that they don't see themselves as being potential volunteers — that they haven't been playing for long enough, or they're too weak. Most volunteer roles would be entirely appropriate for players of any age, any rank, or who had been playing for any length of time.

Segment 3 is likely to have additional barriers around financial resources, which may also effect things such as ability to travel. Randle & Dolnicar (2009) showed a correlation between volunteer contribution and whether working full-time, part-time, or unemployed (with more available non-work time giving higher contribution). Manning (2019*a*) mentioned that retired

| Volunteer Recruitment | Volunteer Retention | Volunteer Management |
|---|---|---|
| — Role descriptions, including workload<br>— Directly ask people to volunteer<br>— Social marketing<br>— Shared roles / workloads | | |

Table 5: Recommendations from Recruitment

volunteers tend to be more 'hands on' than those in full time jobs, and this is likely to also hold true for a number of under 30s as the under 30s segment is the second highest after the over 60s for low employment levels (Clegg 2017).

To advertise itself to these segments, the BGA will need to complete a full social marketing plan — including a formal positioning statement, decisions for the strategic marketing mix, plans for monitoring, budgeting, and implementation. This will require further research by the BGA, and is outside the scope of this case study analysis.

### 4.4.5 Recruitment recommendations

Based on the above, it is recommended that the BGA regularly asks people to volunteer — both directly to individuals for specific roles, and more generally through social marketing.

It is recommended that the social marketing focuses on the five segments outlined previously, and that the BGA engages in benefits-focused positioning for Segments 1–2 (emphasising how volunteering helps others and the learning opportunities it brings) and barriers-focused positioning for Segments 3–5 (emphasising how volunteers don't need to be strong or have been playing for long periods, and making sure that all potential volunteers understand the amount of work required for a given role before starting).

It is also recommended that the BGA aims to recruit volunteers to share existing workloads, to reduce the volunteering costs.

These are summarised in Table 5.

## 4.5 Retention

### 4.5.1 Intention to quit

Scherer et al. (2016) reported — in a study covering a number of US volunteer organisations — that a poor volunteer/organisation fit leads to increased levels of burnout, which in turn leads to greater intention to quit volunteering.

The BGA survey included the same questions as Scherer et al. (2016). The mean volunteer fit for the BGA was comparable (2.66/5 compared to 2.61), but the level of burnout (2.42/5 compared to 1.68), while still low, is notably higher (more than 1 SD above). Intention to quit (2.17/5 compared to 1.92) is again higher than average but still comparable (0.28 SD above). The correlations between the three variables are similar to those found by Scherer et al. (2016).

NCVO (2019*b*) included a 'likelihood to continue' question. Reversing and rescaling the results gives a similar average intention to quit of 1.90, implying that 1.92 is a safe value to use as a baseline for comparison.

While still fairly low (average BGA intention to quit is only 29%), they nonetheless give cause for alarm. The BGA should be trying to reduce volunteers' intention to quit by trying to reduce burnout, which can be helped by improving the volunteer/organisational fit.

Burnout can be reduced in some cases through reducing workload, for example by increasing volunteer numbers and encouraging shared responsibilities. This would reduce volunteers feeling there is no one who could take over and so they cannot stop (Taylor et al. 2006).

Volunteer fit can be improved through investigating the expectations of the volunteer and the organisation — the psychological contract.

### 4.5.2 Volunteer expectations

Although the BGA has expressed concerns about not offering enough assistance to volunteers (Manning 2019*a*), the majority of volunteers found that their relationship with the BGA was largely as expected. Values for those who had never received more or less help than expected, never been prevented from doing things by the BGA, and never been surprised by either recognition or lack of recognition were all between 80 and 90%. The average level of empowerment amongst volunteers was 67%.

62% found tasks to be just as they had expected beforehand. Of the remainder, 41% said that tasks took more time and work than expected. Other reasons included changes in scope, external criticism, and not knowing beforehand what was expected of them.

The BGA should aim to make sure that all volunteers understand from the start what they will need to put into a role, to allow them to make an informed choice. While it may seem counterintuitive to emphasise how

hard and time consuming the work will be, if tasks are not as advertised then volunteers will be more likely to stop volunteering (Scherer et al. 2016, Stukas et al. 2008). People prefer to be well informed.

When asked about barriers to tasks, by far the greatest response was time or other external pressures — potentially implying that volunteers didn't have as many resources as they had expected to need for the task. This was also the joint highest reason given for stopping a task (and highest for not getting more involved in volunteering).

### 4.5.3 Volunteer/organisation fit

Unexpectedly, volunteers were less likely than non-volunteers to feel that their personal values matched the culture of the BGA, or that their personal goals matched the goals of the BGA. This implies that when people start volunteering their opinions of the BGA's culture and aims drop. This may be connected to the lack of correlation between level of volunteering and BGA membership.

One way that the BGA could try countering this is through internal marketing, to improve people's views of the organisation, but it would also be sensible to investigate and address the cause of this drop in perceived volunteer/organisation fit.

Across a range of questions about the BGA, the topic that came up most often was outreach (including publicity and recruitment), followed by tournaments, people/volunteers, and organisational culture. These are likely to be the topics that people are most interested in, as these are the topics that they focused on.

While tournaments and people/volunteers were predominantly positive, outreach was largely negative, and organisational culture was entirely so.

It is important to note that these will be recording people's perceptions, which do not necessarily tally with the actual situation. The BGA should ensure not only that these topics are addressed, but that they are also seen to be addressed, otherwise there will remain a poor volunteer/organisational fit.

### 4.5.4 Retention recommendations

It is recommended that the BGA aims to improve volunteers' expectations through use of role descriptions where possible, including descriptions of the amount of time and effort different jobs entail. It is also recommended that they show themselves to be proactive in addressing issues seen as being important to volunteers — not only by giving them focus (in a way that aligns with the expectations of the volunteers), but also through publicity via internal marketing. A greater volunteer/organisational fit should reduce burnout in general, but it is recommended that the BGA additionally

| Volunteer Recruitment | Volunteer Retention | Volunteer Management |
|---|---|---|
| — Role descriptions, including workload<br>— Directly ask people to volunteer<br>— Social marketing<br>— Shared roles / workloads | — Role descriptions, including workload<br>— Proactive response to volunteers' key issues<br>— Shared roles / workloads | |

Table 6: Recommendations from Recruitment and Retention

reduces volunteer workload by introducing shared roles where possible.

Of course, there is one other reason why people stop volunteering — through death. While this cannot be prevented for an individual, a pool of available volunteers and adequate succession planning can reduce its impact.

These are summarised in Table 6.

## 4.6 Management

### 4.6.1 Use of HRM

The BGA survey included questions from the Volunteer Management Inventory. Mutawa (2015) reports that use of the five Management Practice Constructs (Planning, Recruitment, Training / Support, Recognition, Performance management) have a statistically significant correlation to increased volunteer Retention, Motivation, and Satisfaction.

The BGA's readings for the five Management Practice Constructs are towards the lower end of those described by Mutawa (2015), with an overall HRM level of only 42% (2.7 out of 5 for the BGA, compared to a mean of 3.29 and SD of 0.89 from Mutawa (2015)).

Although the survey also notes a high reported quality of experience for volunteer tasks (73%), and a relatively low intention to quit (average 29%), the introduction of HRM practices may still give an increase in volunteer Retention, Motivation, and Satisfaction. There is also a risk of bias in the survey data — volunteers who are dissatisfied with the BGA may be less likely to fill in a questionnaire.

| | Low cost | High cost |
|---|---|---|
| High quality | **Type A**<br>Overall: 44%<br><br>Club: 51%<br>Tournament: 40%<br>BGA: 35% | **Type B**<br>Overall: 38%<br><br>Club: 37%<br>Tournament: 43%<br>BGA: 40% |
| Low quality | **Type C**<br>Overall: 5%<br><br>Club: 7%<br>Tournament: 3%<br>BGA: 7% | **Type D**<br>Overall: 14%<br><br>Club: 4%<br>Tournament: 15%<br>BGA: 18% |

Table 7: Percentage of tasks that fit into the four categories — overall, and split into tasks directly related to Clubs, Tournaments, and the BGA

The values vary greatly across the five constructs, from 30% for Performance Management to a much better 55% for Recognition.

Elsewhere in the survey volunteers have also mentioned a lack of various management resources, such as listing lack of volunteer training as a barrier to completing tasks.

#### 4.6.2 Task categorisations

The BGA survey split volunteer tasks into the four types described by Haski-Leventhal & Meijs (2011) — both overall and for tasks related to Clubs, Tournaments, and the BGA (see Table 7).

Overall, tasks are predominantly Type A or B (81%); tasks with a high payback in terms of quality of experience, at a range of volunteer costs. There are almost no Type C tasks (5%), and a small but notable number of Type D tasks (14%).

Club tasks (which are likely to be smaller, regular packets of work) tended to be lower cost and higher quality, suited to people with busy lives. As the BGA doesn't have direct oversight of individual clubs these tend to require less management and more facilitation and empowerment. Recruitment tends to happen at a local level — people decide to form or formalise a club, rather than the BGA trying to plant one.

Tournament tasks tend to require low levels of work over an extended period which ramp up to very high levels for a couple of days. Tournaments usually run annually, often organised by the same people each year. Most tournaments are planned by clubs, but some are major BGA events, requiring the BGA to find someone to run them (Manning 2019*a*). These were for the most part still rated as being high quality, but with the increased costs

pushing them into a fairly even Type A / Type B split of tasks. Type B is better suited to volunteers with more available resources, and may require more assistance from the BGA — such as financial aid, or help from other volunteers.

BGA related tasks included tasks such as being a Council member, helping with a publication, or running a BGA event. While the majority of tasks were still Type B, there was a notable number (18%) that were Type D. Haski-Leventhal & Meijs (2011) warns against Type D tasks, as they lead to reduced satisfaction levels and burnout. This is particularly worrying for the BGA, as many of these are the tasks that are required for the smooth running of the BGA.

The BGA should aim to move tasks out of this quadrant as much as possible — either by reducing the cost (making them Type C), or by increasing the quality (making them Type B). The quality for many tasks is still towards the high end, but the costs could be reduced by sharing the workload. Succession planning — having someone ready to step in to a role in its entirety — could be combined with role sharing; spreading the workload (the individual tasks that make up the role) to reduce the individual volunteer costs by ensuring that (where possible) multiple people are able to undertake each task.

The BGA survey data also includes a breakdown of the percentage of volunteers with each primary motive that undertook each task type, and similarly for the percentage that volunteered for Club, Tournament, and BGA related tasks. These show interesting differences between the different volunteer motives:

- Values motive: Altruistic people undertook any type of task (high or low quality, high or low cost, for clubs, tournaments, or the BGA) reasonably evenly.
- Understanding motive: People who want to learn solely volunteered for high quality, low cost tasks, normally for clubs but sometimes for the BGA.
- Social motive: People who volunteered due to social pressure predominantly did low cost, low quality tasks, normally for clubs but sometimes for the BGA or tournaments.
- Enhancement motive: People who find volunteering improves their self esteem mainly did high cost, high quality tasks, either for the BGA or for tournaments.

(None of the volunteers in the survey had a primary motive of either Career or Protective.)

This data could be used to tailor advertising for club, tournament, or BGA tasks to people with particular volunteering motives.

It is impossible to tell whether different types of volunteer are drawn to particular types of task, or whether different types of volunteer are just more likely to view tasks in a particular way. Volunteers with the Understanding motive, for example, might only choose to do tasks that are high quality, low cost — or they might be more likely to view tasks as being higher quality and lower cost than volunteers with other motives.

### 4.6.3 Policies and procedures

NCVO (2019*a*) recommends a number of different policies and procedures for volunteer management:

- Recruitment and selection policy
- Expenses policy
- Insurance provision for volunteers
- Problem solving procedures
- Code of conduct
- Volunteer agreement

While the BGA covers some of the same topics in its existing policies (*BGA Policies List* 2010), it currently has no specific policies on the management of volunteers (Manning 2019*b*).

No recommendation is made that the BGA implements all of these wholesale, particularly as several authors (Taylor et al. 2006, Cuskelly et al. 2006) warn against introducing policies that are seen by volunteers as merely adding a layer of bureaucracy, but they should consider some of the recommendations (such as, for example, volunteer role descriptions, volunteer agreements, or volunteer training) to see whether they would lead to improvements.

This should, of course, be carried out without jeopardising the often entrepreneurial attitude of volunteers. It must be remembered that — particularly in a fully volunteer led organisation — there is a large degree of autonomy for individual volunteers that allows for agile decision making. Policies and procedures should be used to enhance and facilitate the work of volunteers, not to limit or hinder them. As the *BGA Policies List* (2010) already says, 'policies are not intended to restrict our effective operation. Council reserves the right to revise them, or to depart from them in specific cases, where it judges it appropriate to do so, subject to the requirement to conform to the Constitution.'

| Volunteer Recruitment | Volunteer Retention | Volunteer Management |
|---|---|---|
| — Role descriptions, including workload<br>— Directly ask people to volunteer<br>— Social marketing<br>— Shared roles / workloads | — Role descriptions, including workload<br>— Proactive response to volunteers' key issues<br>— Shared roles / workloads | — Greater use of management techniques<br>— Reduced volunteer costs<br>— Shared roles / workloads |

Table 8: Recommendations from Recruitment, Retention, and Management

#### 4.6.4 Management recommendations

It is recommended that the BGA increases its use of management techniques — most notably Performance Management and Recruitment — and works to reduce the volunteer cost of its Type D tasks. This could be achieved through implementing methods for sharing roles between multiple volunteers, to reduce the overall workload.

These are summarised in Table 8.

## 5 Recommendations

The analysis above gives three main areas for recommendations to aid with volunteer recruitment, volunteer retention, volunteer management, and ultimately succession planning. These are summarised in Table 9.

The first is that the BGA should make a list of roles that volunteers could undertake, including everything from Council positions to ad-hoc outreach events. Each should have as accurate as possible a description of what the role actually entails ('warts and all', including the amount of time and effort that a volunteer would need to expect to put into it) to improve volunteers' expectations. This would not only allow potential volunteers to see what they can do to help, but also reduce the risk of a break in the psychological contract through a disconnect between expectation and reality.

The second area is that the BGA should be more proactive in asking people to volunteer, and should consider making greater use of HRM practices around recruitment. This includes 'headhunting' specific individuals

| **Volunteer Recruitment** | **Volunteer Retention** | **Volunteer Management** | |
|---|---|---|---|
| — Role descriptions, including workload | — Role descriptions, including workload | | Explain what roles are possible and what they actually entail |
| — Directly ask people to volunteer<br><br>— Social marketing | — Proactive response to volunteers' key issues | — Greater use of management techniques | Encourage people to consider becoming volunteers |
| — Shared roles / workloads | — Shared roles / workloads | — Reduced volunteer costs<br><br>— Shared roles / workloads | Ensure multiple volunteers could undertake each task |

Table 9: Shared recommendations from Recruitment, Retention, and Management

for certain roles, and undertaking social marketing to encourage people to think of themselves as volunteers.

The social marketing should focus on the help that volunteering gives others and the learning that volunteers can gain, and should target players who may not think of themselves as volunteers (notably younger players, weaker players, and players who learned relatively recently). The BGA should also increase publicity of how it is addressing issues that volunteers consider to be important.

Thirdly, where possible, the BGA should aim to introduce a multiskilling policy for volunteer tasks. This would involve splitting each role into its component parts, and making sure that each individual task had at least two people who were able to do it, where possible working together. This improves volunteer retention and reduces volunteer burnout, both by reducing the workload and by removing the belief that they can't stop because they are irreplaceable to the organisation. It also reduces the risk of lack of direct succession planning — if most tasks can be done by multiple people, then the tasks will still be done if one person stops volunteering.

This may require a greater number of volunteers, but each volunteer would either be doing a less costly job, or would be spreading their contribution over a wider group of tasks. This will require mechanisms to be put in place to aid job sharing. The introduction of such a policy should hopefully be straightforward for existing BGA committees (where multiple volunteers already work together on similar tasks). The BGA has no direct control over many volunteers (tournament organisers, people who run clubs, etc), but the advantages of such a policy could be disseminated through training (with suggestions such as creating a committee to organise a tournament to spread the workload).

These three areas of recommendation should not only increase the number of volunteers but also their level of contribution, and should reduce the risks inherent with having multiple single points of failure. The death in the future of a key volunteer should be easier to manage — whether the organiser of a major tournament, or an important BGA council member.

# 6 Conclusions

This analysis has important implications for other volunteer run organisations. Succession planning is a form of insurance that many will consider, in the words of Roger's replacement as BGA President, a 'luxury [they] can't afford' (Manning 2019*a*).

The focus on volunteer recruitment over volunteer retention is seen as a widespread problem (Brudney & Meijs 2009, Cuskelly et al. 2006, Taylor et al. 2006), and by breaking down and sharing volunteering roles not only is an element of succession planning introduced inherently to the organisation,

but the rate of burnout for individual volunteers is likely to fall.

The data from the BGA supports the literature in that a major barrier to volunteering at all stages (both starting and continuing) is the time commitment when weighed against volunteers' otherwise busy lives. By outlining the amount of work that will be required from the outset, volunteers for any organisation will be less likely to be put off from starting, and less likely to stop volunteering due to it being more work than expected.

For all volunteer led organisations, their greatest asset is their volunteers. If they are to flourish they must put great effort into their recruitment, their retention, and their management.

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