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From The Bottom Up

A Growth Strategy For Grassroots Groups in Ontario

Grassroots Growth

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Executive Summary

Despite facing significant barriers to accessing resources and support, Ontario's robust and expanding networks of grassroots organizations are defying expectations, becoming the driving force behind cultivating inclusive, empowered communities through a passionate, volunteer-led commitment to change. Too often over-looked, grassroots groups have traditionally flown under the radar of the non-profit management community, which has provided non-profits and charities with invaluable support, particularly in terms of managing one of the most critical components to any organization— their volunteers. To properly address this gap and to devise new capacity-building solutions, it is critical to develop a deeper understanding of grassroots groups, acknowledging and building on the traits and characteristics which make them so similar to and yet so different from larger non-profits.

In this report, The Grassroots Growth Project has used a number of research approaches to construct a glimpse into the state of volunteer-run non-profits with small budgets across Ontario, in an effort to highlight their achievements and learn how we can best help them increase their impact through volunteer engagement.

While it is essentially common knowledge that a lack of time and money affect grassroots groups' capacity significantly, our research has found that there are structural, technological and practical solutions that can ease those burdens while addressing other barriers entirely. Through the analysis of first-hand accounts, as well as through academic and sector-support channels, we have identified ten characteristics, seven trends and twenty themes, all of which have led to the discovery of important considerations and helped identify the most relevant best practices.

CHARACTERISTICS

The characteristics of grassroots groups that were identified through a literature review and through original research will allow us to develop resources that take into account notable features of how grassroots groups function, as well as notable risks they may face. For example, grassroots groups are typically committed to equity and provide a supportive community for their members. Although they face many challenges, they may be unable to identify the type of training or support that could help them most; they often lack access to resources that would explain and inform the root cause of their problems.

TRENDS

Several of the trends identified through our literature review revolve around group structure. The inclusive and collaborative nature of grassroots groups makes them particularly popular and today's entrepreneurial community champions work within both non-hierarchical and professional group structures to organize their membership. Typically, groups will go through periods of change and restructuring, seeking the most effective and efficient way to govern themselves. They must also grapple with whether or not to incorporate and how that might affect their volunteers moving forward.

THEMES

Original research engaging grassroots groups and the agencies that work with them revealed 20 common themes outlining the major challenges faced by these groups. Most notably:

- A lack of knowledge about governance and structure, crucial to help new and restructuring groups determine how the group's core volunteers will function and how they will approach expansion.

- Overburdened core volunteers, with difficulty recruiting new members and assigning work to help share the huge responsibility of running a grassroots group.

- A lack of understanding of basic volunteer management practices and how traditional volunteer management could be adapted to a grassroots context.

These findings, among others outlined in the report, have allowed us to compile a list of training topics which will inform the development of a community of practice and assist grassroots groups with tackling their most difficult volunteer management challenges.

Workshop A: Grassroots Governance: Building a Structure that Fits

- Module 1: Defining your Organization

- Module 2: Becoming Legitimate

Workshop B: Managing the Core

- Module 3: Avoiding Burnout

- Module 4: Proactive Approaches for a Strong Core

Workshop C: Expanding and Growth

- Module 5: Building a Following

- Module 6: Recruiting Volunteers

Workshop D: Leading Beyond the Core

- Module 7: Grassroots Volunteer Management Basics

- Module 8: The Logistics of Managing More People

Moving forward, the Grassroots Growth project will base project decisions on key findings revealed throughout the research process:

- Many resources already exist, but are not being used by grassroots groups. These resources must be made more accessible to them, and new training must be developed to fill the gaps in existing support.

- Resources must be free, accessible and most importantly, they must provide the tools to recognize which management guidelines and best practices are right for individual groups.

- Due to the collaborative nature of grassroots groups, they can learn from each other and it can be helpful to share experiences when addressing problems. Opportunities for networking, collaboration and mentorship should be provided.

Introduction

Grassroots groups are uniquely dependent on volunteers in order to achieve their missions. They must focus both on self-management as a volunteer (the core leadership) and the management of others (new members and supporters). The Grassroots Growth team has used multiple research methods to better understand the particular volunteer management needs and challenges of non-profit groups that are run by volunteers.t

Through this report, we have sought to define, characterize, examine, engage, analyze and support grassroots organizations in Ontario. Recognition must be given to the fact that there are inconsistencies between the experience of groups in rural and urban areas. Membership size, age of establishment, mission and type of group, among other differences, are also important considerations. However, we have found that many challenges are shared and can be addressed by offering groups an array of solutions, so that they can choose the ones that meet their individual needs.

We have learned that while some sector best practices are suitable and may not be used by grassroots groups due to simple lack of awareness, there are also unique barriers to consider, as volunteers adopt the hefty responsibility of running an organization in their spare time. The motivation to take on such a remarkable feat stems from a passion and drive to serve and support local communities and to fill the gaps that the private sector, government and even larger non-profits do not currently occupy.

Rationale

Grassroots groups play a vital role in Ontarian society, building and strengthening communities, providing a variety of services and supports, enabling civic engagement, advocating for and supporting marginalized groups and addressing the most pressing social issues facing our communities (Gouthro, 2010; Smith, 1997).

Being able to manage volunteers effectively is a key part of a non-profit's success, particularly for grassroots groups that rely solely on volunteers to achieve their missions. According to David Horton Smith, a well-known scholar of grassroots groups, maintaining a solid volunteer base is essential for grassroots success. He states that a grassroots group "must attract and hold volunteer members and leaders no matter what else it does, if it is to have a significant impact" (Smith, 1999, p. 444). Volunteer time, rather than funding or other resources, is the driving force behind grassroots groups.

Over half of all non-profit organizations in Ontario (53%) have no paid staff and are run entirely by the efforts of volunteers (Scott, Tsoukalas, Roberts & Lasby, 2006). Although grassroots groups account for a large proportion of the non-profit sector in Ontario, existing volunteer management training focuses almost exclusively on the needs and structures of larger organizations. As we will discuss later in this report, a wealth of volunteer management training and resources exists, but focuses on more formalized approaches to volunteer engagement than grassroots groups tend to use and assumes that organizations have a designated volunteer manager on staff. Grassroots groups have unique needs, structures, resource availability, approaches to engagement and knowledge levels that make these existing resources difficult for them to identify, acquire and apply to a grassroots context. A more formal model of volunteer management cannot be translated to a grassroots context and should not be imposed on these groups (Ockenden & Hutin, 2008).

Volunteer management is integral to the success of grassroots groups, yet volunteer management training and resources that take the unique needs of these groups into account are not currently available and accessible. This project set out to better understand the volunteer management needs and challenges of grassroots groups in Ontario, in order to provide tailored training and online peer mentorship to help them manage volunteers effectively, thus increasing their capacity to achieve their missions.

Definitions

GRASSROOTS GROUPS

Grassroots groups are defined by this project as any non-profit group with an annual budget less than $75,000 and no full-time equivalent staff. This definition is in line with that of the Volunteer Toronto Community Subscribers service, a free version of our service package for not-for-profit organizations.

CORE VOLUNTEER

Core volunteers are members of grassroots organizations that participate within a leadership capacity. They may do so within a defined, structured role, or simply be part of a collective group that are deeply involved in the management of the organization. Often, group founders are considered integral core volunteers.

SUPPORT VOLUNTEER

Support volunteers are those who assist the leadership in carrying out the work of a grassroots organization. This may be within a defined role, or on an as-needed, occasional basis. Some support volunteers may be long-time participants that do not have the interest, time or resources to take on more significant leadership responsibilities, or those who may be new to the group.

Voluntary Sports Organizations (VSOs) – An Outlier

Although sports organizations have been identified as a large proportion of volunteer-run organizations in Ontario (Scott et al., 2006), there are factors that make them distinct from other types of grassroots groups.

Since the late 1970s, funding provided to amateur sports groups by the Canadian government has led to improved management and governance and increased the number of paid staff. This heightened level of professionalism, which grew in part out of sports groups' unique need for additional insurance and liability protection, makes these groups an outlier in the grassroots community. While many sports groups continue to be run completely by volunteers, dependence on staff is deepening. Groups are now evolving from volunteer-managed to "a combination of professional and volunteer management" (Auld and Godbey, 1998, p. 20).

Additionally, as a result of the more structured requirements of VSOs, boards have become increasingly dependent on the existence of paid staff.

Thus, although many of the day-to-day operations of sports groups are conducted by volunteers, paid staff are becoming integral to the overall efforts of VSOs. For this reason, some of these sports groups do not fall under the category of "grassroots" as developed by the Grassroots Growth Project.

VSOs are also distinguishable from other grassroots groups by the way they are funded. While the majority of grassroots groups rely on a combination of fundraising and personal contributions from board member to gather revenue (Hoye and Cuskelly, 2003), these activities are generally not applicable to VSOs. Hanberg (2015) insists that board members of very small groups have a responsibility to contribute financially, and oversee fundraising efforts. The absence of this in VSOs marks them as separate from a working definition of grassroots groups.

Grimm, K. (2009) *The Just Enough Planning Guide: A roadmap to help nonprofits reach their campaign goals.* Washington, DC: Spitfire Strategies.

Heal 4 Life

HEAL4Life was founded by two brothers with the mission to inspire a conversation around young men's health. After one of the brothers, Kyle, was diagnosed with testicular cancer at the age of 23, they used social media, in person appearances and sporting events to speak directly to young men about health.

Challenge

DIFFICULTY IDENTIFYING EXISTING RESOURCES

Co-founders Kyle Williams and Drew Williams spent three years investing time and energy towards starting their new health promotion non-profit organization. They had many questions about governance, incorporation, and accounting but they had no expertise or funding to hire professional services. They were able to find a free resource program in Burlington for start-ups and took full advantage of the program to launch their new nonprofit.

www.heal4life.ca

Methods

Literature Review

Academic literature searches were conducted through a variety of sources, including the University of Toronto library, Ryerson University library and Google Scholar. Academic journals, articles and other reports were identified through online searches and recommendations from experts in the sector. Over fifty works were referenced to situate the Grassroots Growth project within an existing body of research and knowledge; a complete reference list can be found at the end of this report.

Original Research

AGENCY CONSULTATIONS

In order to gain information and advice from those who have worked with grassroots groups in the past, we held consultation meetings with networks and agencies that frequently work with or serve grassroots groups. Three consultation meetings were held in different areas of Toronto. In total, 27 participants from 21 networks and agencies attended. They reported working with anywhere from 2 to 50 grassroots groups, with an average of about 20 grassroots groups.

Consultation meetings were facilitated discussions led by Grassroots Growth project staff and focused on a series of questions about building relationships with grassroots groups, the structure and functioning of these groups and gaps in the information and support that is available to them.

FOCUS GROUPS

Four focus groups were held in various parts of Toronto in order to gather in-depth information from representatives of grassroots groups. A total of 17 participants attended, representing grassroots groups from various sectors including community development, religious, science & technology, youth, cultural, environmental, advocacy and women's organizations. Focus group participants were required to attend on behalf of a group with no permanent paid staff members and an operating budget of less than $75,000.

Focus groups were in-depth discussions about key questions posed by Grassroots Growth project staff, focusing on the challenges faced by grassroots groups, what they perceived to be their major training needs and what resources are currently available to them.

SURVEY

In order to gain input from a larger number of grassroots groups, including groups across Ontario, an online survey was created. They survey was distributed through Volunteer Toronto's website, newsletter and social media channels, as well as through voluntary sector networks such as the Ontario Volunteer Centre Network (OVCN). A draw to win two $50 gift cards was included as an incentive for participation. Just over 100 volunteer-run groups participated in the survey, which included questions about group structure and functioning, needs and challenges and resources currently available.

CASE STUDIES

Case studies were conducted to obtain a snapshot of the founding, functioning and challenges of various types of grassroots groups. Information for case studies was obtained through in-depth semi-structured interviews, conducted in person or over the phone. A total of 7 case studies were completed with a broad range of groups in terms of their size, structure and sector: Annex Cat Rescue, Heal 4 Life, North York Moms, Paper Kite Foundation, Ranked Ballot Initiative of Toronto, Toronto Gay Football League and Women in Toronto Politics.

Case Study

Three kittens rescued from a feral colony on Cherry Street.

Annex Cat Rescue

The Annex Cat Rescue was founded in 1997 as a small group of volunteers in the Annex neighbourhood of Toronto. It has since grown to include 700 volunteers from all over the city and helps feral and stray cats all over Greater Toronto Area.

Challenge

MANAGING SUPPORT VOLUNTEERS

With a growing volunteer base including 300 active feeders and foster homes, creating a proper database is a major priority for the future. The organization is reliant on a dedicated volunteer base focused on maintaining and tracking the master list, but their current system has many challenges and limitations.

www.annexcatrescue.ca

Findings

Characteristics of Grassroots Groups

DEVELOPING RELATIONSHIPS

According to the agencies we spoke to about their experiences working with grassroots groups, in order to develop relationships with them you must become a part of their community. Whether it is their physical community or the grassroots community at large, grassroots groups form relationships with organizations they meet at community events, meetings and community hubs. They can also form relationships with other organizations through existing networks, or referrals from other groups. Grassroots groups are also likely to form relationships with organizations that are willing to form partnerships with them and work collaboratively towards common goals, or organizations that are willing provide support and help them build capacity.

INFORMAL MEETINGS

According to the agencies we spoke to about their experiences with grassroots groups and according to grassroots groups themselves, they often do not have formal meeting space. Groups tend to hold meetings in their own homes, or rotate through various free locations. Often, support volunteers work from home or out in the community and rarely spend time with the group as a whole.

Some groups have the good fortune of accessing resources to assist in finding space. According to research participants, local politicians are often a valuable support for groups because they can connect them with churches, community centres and other space – typically at little to no cost. However, it is usually the case that leadership has the appropriate networks and individual confidence to take advantage of these types of opportunities.

FORMING GROUPS

Grassroots representatives who provided us with feedback for the project stated that grassroots groups are often formed by a small group of friends, family or community members who care about the same social or community need. They often begin casually and begin to identify as a group once they start working towards specific goals. Self-identification is a key term, as grassroots groups typically face obstacles in determining how they want to be defined to the public and those they seek to support and how they want to be defined among the membership.

FOUNDERS

In many cases, grassroots groups develop as the result of one or two individuals with significant interest in reaching a particular goal. As the group expands, and with the influx of new members joining when original members depart, founders may find themselves at odds with the new direction of the organization and may decide to leave (Causton, 2008). However, this is not always the case, as often founders simply find they are suffering from extreme burnout and decide to consciously depart without hostility.

Case study participants support Causton's (2008) argument that founders may also leave because they recognize that it is within the best interest of the group's continuation, as the group may be too centralized around them personally, leading to difficulties with succession planning and over-burdening. Often founders will remain in an advisory capacity or change their role to adopt a new professionalized title (such as Executive Director or Board Chairperson) when the governance model of the organization evolves.

SELF-FUNDED WORK

A recent study on grassroots funding found that group leaders and funders both believe that there is generally less incentive to fund grassroots organizations and money is more likely to be given to groups that enter into partnerships (Bothwell, 2002). As such, funding for grassroots groups is personal and local (Causton, 2008). According to our own research, often the members (usually the leaders) of grassroots groups cover expenses out of their own pocket. Several research participants we spoke with indicated that they were essentially self-funded, with members splitting the cost of operating the group, or with one leader covering expenses such as rewards for other volunteers.

LIMITED KNOWLEDGE AND SKILLS

Based on our focus group findings, participants believe they are working with limited knowledge and skills. The leaders themselves state that they feel unable to compete with sector professionals for resources, namely grant funding and volunteer time. The support volunteers often do not have the same level of training or expertise as someone doing similar work in a paid position for a larger organization.

This is directly linked to the fundamental problem that members, particularly those in leadership positions, are generally unaware of best practices and lack experience and access to support available to non-profit professionals. Focus group participants noted that addressing specific needs such as web design or accounting could be extremely difficult without established networks or personal relationships that can be leveraged when necessary.

In an interview published in Grassroots Governance: Governance and the Non-Profit Sector, Lynn Ann Lauriault noted that when those in leadership positions lack the proper information, as well as the understanding of where to find it, they are unable to self-train, leaving individual and collective responsibilities unclear (Causton, 2008).

SMALL SIZE

Grassroots groups are generally considered to be small, especially in the eyes of the non-profit sector as a whole. Evidence from a recent study has shown that smaller, younger organizations benefit from their likelihood to take a more aggressive and proactive approach to increasing program development capacity than larger non-profits, since their survival as an organization may depend on it (Trzcinski & Sobeck, 2008).

Other studies indicate that there is an optimal membership number for any given grassroots group and that it is often determined by an average between the vision of the founder and that of the new membership (Van Puyvelde et al., 2015). This optimal size exists, according to the authors, because potential members have their own preferences about the mission and may resort to actions that divert the mission to their own interests.

Focus group participants pointed out that grassroots groups do not necessarily want to grow or professionalize their structure. Some groups may function better with few members and an informal structure, and attempting to expand or become more formal may alienate volunteers, limit possibilities and create more work than the group wants to take on. Smith (2010) argues that many groups decide against increasing their membership size, opting instead for less complexity and hierarchy, as there is simplicity in managing more informal relationships. In terms of scheduling last minute meetings and working independently, this informality allows for a more flexible atmosphere, which is especially attractive when time and resources are so limited.

GROWTH AND PROFESSIONALIZATION

Many focus group participants acknowledged that they often receive advice to incorporate or adopt formal governance structures and some believe that those steps would, in fact, help them seem more professional and give them access to much needed resources and funding opportunities. However, some that had taken this advice reported issues, such as an inability to meet requirements for funders and execute programming as intended, as well as problems with volunteer retention, particularly for required core leadership roles (e.g., Treasurer).

Despite these challenges, professionalization can offer groups legitimacy and protection for liabilities (Aptowitzer, 2014). Further, some programs such as TechSoup Canada, which provides free software and informative resources, require groups to be incorporated to access their sources. Thus for some groups, the benefits of these resources are worthwhile.

Professionalization can also be a useful tool for grassroots groups facing the development of conflict. Agency participants in our consultations noted that inability to address conflict and manage personalities was a major factor in the deterioration of some otherwise solid organizations. Experts across the board agree that conflicts are inevitable in grassroots groups, but that they can be avoided and their impact reduced by having mechanisms to address them in place beforehand (MacDonald, 2013; Smith, 1997).

According to a study on growth potential in grassroots organizations, groups that have undergone leadership change over time were expected to be more prepared to grow and expand, as this fosters potential for new ideas to emerge and increased motivation to embark on new projects and initiatives (Trzcinski & Sobeck, 2008). However, the authors learned that often in cases where the founder was significantly involved in a leadership position, leadership change is likely to cause challenges due to the group's comfort with the status quo and the dynamism of the departing leader (Trzcinski & Sobeck, 2008).

SUPPORTIVE COMMUNITY FOR MEMBERS

Many focus group and case study participants indicated that they attempt to provide a supportive environment for volunteers, including helping them access other services, mentoring them, attempting to provide opportunities that will help them build skills and attempting to provide a positive and friendly environment. Some groups noted that volunteers remain with organizations because they have fun working with them, or because they enjoy working with their peers and develop friendships. One group noted that they use a "people first" approach; they find a role for everybody who is interested in volunteering and never turn anyone away.

COMMITMENT TO EQUITY

An Urban Institute study on volunteer-run boards showed that they differ in representation of equity-seeking groups when compared to larger organizations (Ostrower, 2007). Smaller groups with budgets of less than $100,000 were found to be over three times more likely to be white-dominated and have challenges with improving diversity and representation of marginalized groups. However, small organizations that serve equity-seeking groups were far less likely to have the same problem, noting that at least 50% of the leadership was representative of the target group community. However, even within those organizations, the authors still identified a lack of diversity as a critical issue, drawing attention to its ability to reduce credibility and trust of a diverse community and alienate potential volunteers. By comparison, smaller organizations were found to have a far better representation of gender – the larger the organization, the less likely women were to be involved in leadership.

Focus group participants noted that equitable representation was important to them, but could be a challenge. They cited difficulties maintaining a safe space for equity-seeking groups, due largely to a lack of awareness and sensitivity among certain volunteers.

Major Trends from the Literature

CYCLES OF RESTRUCTURING AND CHANGE

In reviewing six case studies of small, volunteer-led groups, Ockenden & Hutin (2008) found that all the groups functioned through a mix of informal yet structured systems of management; in other words, structures were in place and people would stick to the protocol when necessary, but did so in such a way that suited the group and the volunteers. From the standpoint of more bureaucratic organizations, this could be perceived as "messy," but it worked well for these groups. Grassroots groups in their early stages in particular are often either without a clear structure or operating within one that is loosely defined and ad hoc (Smith, 1997).

"Flexibility" appears to be the watchword and volunteers must be regarded as a diverse group, who can have multiple motivations for volunteering which can change over time (Zimmeck, 2000). As a result, groups are likely to go through the process of organizational change as it becomes necessary. According to Burke (2014), this typically refers to the implementation of a new governance structure (not necessarily formal), or the dissolvement of one that was not meeting the group's needs. Trojan, Halves, Wetendorf and Bauer (1990) identify a series of stages of increasing bureaucratization and organizational complexity that can arise over time, irrespective of membership size, although not every group must go through all the stages. The most successful groups take a proactive approach to change, making a conscious effort to consider their goals within the confines of their capacity.

There are a few considerations that could be made to make the process easier; as Burke (2014) points out, it is best to approach change with a plan, rather than be forced into the process.

Defining Leadership

According to Causton (2008), the transition period can be extremely difficult for groups, as the departure of founding members leaves a gap in the organization's institutional memory—parts of their history and operational knowledge. The author suggests that formalizing best practices can mitigate the loss and that focusing on administration is critical to surviving this phase. She notes that groups with a less-structured, more collective model may opt into a more professional working board option.

No Need To Rush

There appears to be a general consensus that any kind of change sought by a grassroots group requires time if it is to be accomplished. People seldom change their personalities and long-time perspectives, habits, or belief systems overnight; member change takes time. Grassroots groups usually need at least a year or two to have an impact, so persistence is one key to internal effectiveness (Smith, 1997).

Taking Parts from "Mini Theories"

Understanding the psychology of organizational change begins with consideration for basic human social interaction, individual need and how the two intersect to impact any given grassroots group. Burke (2014) notes that a brief review of theories such as Maslow's Hierarchy of Needs can be quite helpful for transitioning groups, but cautions that "mini theories address only certain aspects of organization change" (Burke, 2014, p.189).

Smith (1997) argues that a well-developed ideology helps any type of group meet its goals more effectively, because there is a psychological need for individuals to have a rational understanding of what they are socially expected to do and how it relates to an intended outcome. He notes that strong, well-defined grassroots ideologies "speak to this human need for rationality, especially in a group where what is being asked of members may sometimes seem irrational, silly, or useless on its face and therefore needful of explanation to most participants" (Smith, 1997, p. 452). Further, it can serve as a defense for members against skeptical non-members who may disagree with either the individual's participation, or the group's purpose and ideology.

During a transitional process, groups should consider their ideology and purpose as they are developed into a mandate. Change can come as a result of revisions to a group's mandate, which is not necessarily static. As exhibited by Smith's (1997) assertions about ideology, a clear and commonly understood Mission Statement is important for grassroots groups and should be developed by the leadership. Mandates should be explicitly defined within the statement, as ideologies should be clear not only to the membership, but also to the general public— particularly potential new members. According to Lynn Ann Lauriault, a sector specialist (as quoted by Causton, 2008), it is the leadership's responsibility not only to set the mandate, but also to plan measurable outcomes to achieve it. Furthermore, groups must periodically take the time to review and reaffirm, or revise their mission statement, because if there are significant changes, it may also be time to change governance models (Causton, 2008).

GOOD BOARDS: PROFESSIONAL AND CORPORATE GOVERNANCE MODELS

Accountability and performance for all types of groups can be linked directly to how they have chosen to structure their membership. At its core, good governance brings clarity to the mission of a group and deeply impacts other challenges – from conflict resolution, to communications, to project management and more (Smith, 1997; Smith and Shen, 1996; MacDonald, 2013; Bothwell, 2002).

Research on boards and governance in the voluntary and non-profit sector as a whole has increased significantly over the past decade and has resulted in a substantial collection of publications, many of which reference volunteer-run groups. Organizational structures, practices and impact are the most common subjects in this area of study. However, in recent years, a trend has grown toward examining the individuals that participate in the governance process, what keeps them motivated and the effect they have on the group (Renz and Andersson, 2014). In his book, *Non-profit Governance: Innovative Perspectives and Approaches*, Cornforth (2014) notes that there has been a shift away from unitary and hierarchical structures to more fragmented, arms-length systems. For the purposes of researching grassroots groups, it is important not to discount more professional models completely, as our research has shown that many groups are still adopting these approaches to governance. However, the effectiveness, application of practices and appropriateness of professional models are still in question. While the consensus of the literature specific to volunteer-run groups suggests that models used by non-profits with paid staff were generally not applicable, newer research shows that some elements of more professional governance systems can work in the right circumstances (Hanberg, 2015) and that professional board structures can be necessary, as grassroots leaders may not always be capable of dealing with major conflicts, like disputes over control of the organization (Aptowitzer, 2014).

A study of over 80 volunteer-run non-profits in Boston found that addressing governance is a holistic solution to a wide array of challenges faced by grassroots groups and that approaches and recommendations used by non-profits with paid staff were generally not transferrable (Smith & Shen, 1996). At the time, the most common governance structures were based on corporate models with professional boards, adopting strict guidelines and hierarchical structures. New approaches have been found to be useful for grassroots groups, but they are mostly sector-specific. Although there are many different structures to choose from, it is especially critical for grassroots groups to find the one that best suits their unique needs (Smith, 1997; Causton, 2008).

According to Cornforth (2014), the principal role of a non-profit board is to make decisions about important issues, including the purpose of collective action, strategies for achieving purpose and oversight and accountability methods. This broad definition is suitable for many different non-profits, at various stages of development. Specific to grassroots groups, Erik Hanberg (2015), author of *The Little Book of Boards* explains that depending on their unique circumstances, boards have different purposes and fundamentally they develop policy, ensure the organization is carrying out its mission and oversee finances.

Very small non-profit boards that have a clear understanding of their role, remain focused on the right tasks and committed to improvement will be able to exceed the limitations of their human resources and maximize their impact (Freiwirth, 2014). That is the ultimate goal for these groups; however, getting to that point is challenging. According to Hanberg (2015), small non-profits often have very inexperienced boards. He notes that the smaller the group, the more likely a board is to be highly engaged in the operations of the organization, often by necessity. It is likely that the board members account for the core volunteer staff and often take on the responsibility of completing tasks and delivering programming.

There are three major roles played by volunteers on a working board: worker, client and owner (Pearce, 1993). "Worker" refers to the volunteers who complete the aforementioned tasks. "Client" refers to the members affected directly by the organization's work. "Owner" refers to the responsibility the member has over management, operations and success. According to Shilbury (2001), an "ownership vacuum" exists, because in contrast to private firms, non-profit organizations are not owned in the traditional sense. In the absence of owners, she describes volunteer board members as principal stakeholders and notes that they participate in a collective ownership of organizational outcomes.

In very small groups, the effectiveness of the board determines the capacity for the organization to be successful in pursuing its mandate (Cornforth, 2014). Although some organizations with only a few dedicated volunteers were still very effective, Smith and Shen (1996) note that there is a major link between perceived effectiveness and actual effectiveness. Their research found that constituency size and perceived effectiveness go hand-in-hand, making membership size an influential factor in effective governance. They also note that the greater the perceived public benefit of any volunteer-run organization, the more effective the group was perceived to be. This means that the more widely-beneficial and unique the goal and mission are, the more likely a group is perceived to be governed well.

Groups consider the Chair responsible (Hoye & Culskelly, 2003). Both functional boards and dysfunctional boards hold the Chair responsible for the Board's performance. Boards expect the Chair to be responsible for keeping the group focused and ensuring the mandate is being met (Hoye & Culskelly, 2003). In reality this does not always work because Chairs of volunteer-run boards rarely have the required time to invest in board development and succession planning, let alone performance evaluation.

CHOOSING TO INCORPORATE… OR NOT

Traditionally, incorporation was considered the obvious next step in the growth of any given organization. Many older guides to starting a non-profit include substantial sections on the pros and cons of becoming an incorporated non-profit or a registered charity, with the assumption that groups will eventually opt into one or the other. Over the past two decades, there has been an emerging trend towards providing an alternative to that process, in spite of the fact that there are still many benefits to formal registration.

In Ontario, corporations are subject to government supervision of their operations, particularly in terms of their finances. According to Causton (2008), the province offers five types of non-profit organization designation, the most strict being charitable status, and that they, alongside any groups receiving government funding or subsidies, will have additional reporting requirements. Aptowitzer (2014) notes that liability is a major concern for unincorporated associations, as members would be responsible for any damages.

The discussion behind the advantages and drawbacks of incorporation are studied within the Public Administration field as an examination of how governments interact with the non-profit sector. Government–non-profit relations study is moving toward a more comprehensive understanding of these relationships, what drives them, what features are possible and potentially desirable to particular individuals, as well as what their implications are for a variety of stakeholders (Brinkerhoff & Brinkerhoff, 2002).

With that in mind, where registration was once thought of as a necessity, arguments have begun to surface as to the complexities, particularly for advocacy groups, in their ability to fulfill their mandate when they are subject to strict regulation of political activity that can come with some levels of incorporation. Brinkerhoff and Brinkerhoff (2002) describe this as a tension between political roles and a non-profit's ability to deliver services, one of six notable themes for which there was a consensus in the literature at the time.

Of the other themes identified by Brinkerhoff and Brinkerhoff (2002), the ongoing "blurring" between the non-profit and private sectors was also particularly relevant to grassroots organizations considering incorporation. This has to do with the emergence of social enterprises, occupying the space between the non-profit and private sectors by taking business-like approaches to socially-conscious initiatives, motivated simultaneously by profit and a prosocial mandate (Dart, 2004). There is a general consensus that social entrepreneurship is growing in popularity, but that the term still broadly includes a spectrum of groups that are more financially motivated and less prosocially focused and vice versa. For grassroots groups in their early stages, determining whether or not the group is to be entirely not-for-profit is a key factor to be considered when deciding if incorporating is appropriate (Dart, 2004).

Ultimately, even advocates for incorporation and professionalization like Aptowitzer (2014) admit that it is much more simple and inexpensive to organize under the title of "Unincorporated Association," as finding legal support can be quite costly. Further, having the ability to decide against adopting a professional board structure (a requirement of incorporation) may be useful for groups that prefer to operate in a non-hierarchical governance model and avoid the strict rules associated with incorporation.

Residents' Associations

A GROWING GRASSROOTS GROUP

According to Paul Bain with the City of Toronto's Planning Department, there has been a *renaissance of resident-led initiatives sprouting in neighbourhoods across Toronto*". Resident's Associations are completely volunteer-run, and usually depend on modest membership fees for funding. They are informal, which can make it difficult to measure their influence on policy. Anecdotal evidence suggests social media has played a role in this trend, due to the simplicity of networking. A recent *Toronto Star* article explained that the rising popularity of Residents' Associations comes from increased local development, which residents are often opposed to, and suggests it may be time to involve more community members in the development consultation process beyond initiatives by City Planning.

As of 2014, there are approximately 500 groups registered with the City of Toronto. Local journalist David Topping has published a map that shows all the groups in the city, which can be found at his website: http://davidtopping.tumblr.com/torontoresidents

(Source: Mendleson, R. (2014, September 2). Big Ideas: Why residents' associations are making a comeback. The Toronto Star. Retrieved from http://www.thestar.com)

GOVERNANCE MODELS AND STRUCTURES: NEW APPROACHES

Rejecting Corporate Models

It is ultimately a myth that in order for grassroots groups to address their governance needs, they must adopt a professional structure. There has been a significant trend among sector researchers and local capacity-builders to abandon traditional governance models, as their assumed success lies in a set of formulaic directives, where the understanding is that traditional boards work, but problems lie in how the framework is applied (Freiwirth, 2014). In short, the structure is not the problem, but the group's inability to implement it properly. Many other authors note that this is a result of research too focused on best practices for traditional governance approaches, failing to recognize the underlying issues with normative models themselves. There is insufficient opportunity for members to interact with different parts of the organization, leading to a disconnect between leadership and the realities on the ground. Further, Freiwirth (2014) notes that the focus on professionalism can cause leadership to be much less representative of the communities they seek to serve. This is compatible with the aforementioned findings in the 2007 Urban Institute study, in terms of grassroots groups with community engagement mandates having leadership that better reflects the communities they seek to support (Ostrower, 2007).

According to Smith (1997), simple structures are a key component to the success of many different kinds of grassroots associations. Structures that are non-bureaucratic and non-hierarchical allow for an informal environment, which fosters and permits high levels of participation, trust between members and thus the development of close interpersonal relationships, all factors which are crucial to the group's ability to reach its goals.

Causton (2008) agrees that collective boards without management hierarchies are often the most common and viable model for grassroots groups, but cautions that there is always a risk that if and when informal hierarchies develop, they can lead to the domination of some individual agendas. Similar to the development of an "ownership vacuum" described earlier by Shilbury (2001), while a group may feel collective ownership, Causton (2008) notes that there is also potential for members to feel less responsibility and thus less accountability to the group as a whole.

In a report that examined case studies of leadership in small, volunteer-led groups, the authors suggested that a more formal model of volunteer management "cannot and should not be imposed on, or even translated to, this form of volunteering and capacity-building initiatives that seek to do this should be avoided" (Ockenden & Hutin, 2008, p.41).

COLLABORATION, PARTNERSHIPS AND NETWORK-BUILDING: WORKING WITH OTHER GRASSROOTS GROUPS

To increase their impact, 28 Residents' Associations in North York recently united to become a Federation. Their ability to advocate within political channels is given a boost by the expanded reach: a "strength in numbers" approach. The development of a Federation also provides an opportunity to share resources (Della Porta & Diani, 2006).

Advocacy groups in particular are known to develop coalitions and other partnerships for this reason; the practice and outcomes are described in the literature within Resource Mobilization Theory—the study of how groups organize and accumulate resources, as well as how they choose to use them to forward social movements (Della Porta & Diani, 2006).

According to Bothwell (2002), there are increased fundraising benefits to partnering with other organizations. However, grassroots groups may not be engaging in collaborations and partnerships for grants because—to quote one of his research participants— "*we may not be good enough at building relationships*" (Bothwell, 2002, p. 389).

Although there are many positive outcomes within these partnerships, there are some drawbacks to consider. Issues of competing priorities, the dilution of goals and the development of turf wars—among others—are noted by Grimm (2009) as important considerations for groups to address before the partnership begins. Despite this recommendation, groups often do end up in partnerships that begin to dissolve into conflict. To ensure this does not continue, Grimm (2009) suggests that groups communicate constantly, actively seek to grow the coalition over time, delegate responsibilities and create a list of benchmarks and principles to guide the members through the process.

YOUTH-LED INITIATIVES AND THE MILLENNIAL VOLUNTEER

In Ontario, policy initiatives over the past decade have had a significant impact on youth volunteering. There has been a trend toward promotional projects targeting millennials that focus on youth-led initiatives. In addition, programs to encourage high school students and Ontario Works recipients have contributed greatly to an uptake in youth volunteer involvement (Volunteer Canada et al., 2013). This large demographic has unique skills that are valuable to grassroots organizations. Although some of the techniques used to recruit and manage volunteers from other generations are transferrable, the specific traits of millennial volunteers (e.g., their technological savvy, desire for flexibility, etc.) should be taken into account when targeting this demographic.

The trend of unpaid internships is critical to understanding millennial volunteers. There is increased debate around what should be considered an "internship" and volunteer-run organizations should be mindful of the issue when developing position descriptions and requirements. A recent study found that a large majority of Canadian unpaid internships are in Ontario and preliminary results showed that 25% of them were in the non-profit sector (Canadian Press, 2014).

With precarious work being such a concern, young volunteers are an important demographic to understand, as they are in need of skill-building and resume-building opportunities. This has contributed to the sector-wide shift toward support of youth-led initiatives, as professionals seek to empower and support marginalized young people and encourage them to develop their own projects and take over leadership responsibilities (Delgado & Staples, 2007). In Ontario, more local and provincially available community grants have emerged for a number of departments, including Smoke-free Ontario, that require the proposals to be completely youth-led (Toronto Public Health, 2015).

The connection between millennials and technological skills can be used to benefit grassroots groups in many ways. Tech-savvy millennial volunteers are inclined to put their skills to use, as more of them look for experience in the growing tech field such as digital media arts and online communications. millennials, by growing up in the age of the internet, rely heavily on the recommendations of others for all kinds of decisions. Well-connected communities of people of influence (known as "interest graphs") deeply impact young volunteers (Saratovski & Feldman, 2013) and so grassroots groups should place time and effort in maintaining an effective online presence if they wish to attract millennials.

TECHNOLOGY

Technology can affect a group's volunteer management capacity in a multitude of ways. Volunteers consider an organization's online presence heavily when deciding whether or not to join (Hanberg, 2013; Kapin & Sample Ward, 2013) and according to a 2014 study by IdealWare, "A web presence is critical for almost every non-profit." This is a statement echoed many times over by sector experts, but which may be difficult for volunteer-run non-profits with small budgets and limited expertise to achieve. In addition to an online presence, technology can help groups plan, organize and track their activities through the use of community management tools (Kapin & Sample Ward, 2013; Pakroo, 2015). There are a multitude of tools available, some specifically designed for volunteer management, but groups may not know how to identify and use the tools that will work best for them. Despite the barriers to integrating technology into grassroots groups' functioning, there is staggering evidence to support the notion that the groups this project seeks to support would benefit greatly from using digital tools and developing a web strategy (e.g., Pakroo, 2015). Therefore, the benefits differ based on the type of group, their current technological proficiency, their mission and their willingness to expand.

Community Management Tools

The majority of non-profits understand the need to build a database of supporters. There are many tools that can make volunteer management and communications significantly more efficient for volunteer-run organizations. Volunteer-based organizations have to keep track of a lot of data — for example: contact info, schedules, time sheets and job sites — and the right software can help, freeing time for managing volunteers. The pros and cons of volunteer-only management systems versus systems that track volunteers alongside donors or other constituents must be taken into account before assuming volunteer management software is right for any non-profit – especially volunteer-run groups with small budgets (Idealware, 2011).

Content Management System and Membership Software

A strong Content Management System (CMS) can be a useful solution to accommodating the unique needs of volunteer-run organizations. In general, a CMS is a software package with the tools to design a website that is simple enough for non-technical staff —or in this case, volunteers—to update (Idealware, 2014). There are many different platforms that offer different features. Although the benefits often depend on the capacity and mission of any given grassroots group, there is usually a platform to suit any budget and level of technological proficiency.

The needs of most small organizations are better served by a CMS with built-in volunteer management capability; these systems eliminate the need for complicated, expensive integrations, making it easier to manage records, since there is often overlap (Idealware, 2011). Essentially, when money and time are in limited supply, it makes more sense to get one platform that does everything – even if it does not do it as well as specialized software.

Although there is often a cost associated, platforms like NationBuilder have pricing based on the size of an organization's list. One of the most substantial benefits to bringing CMS software into a volunteer-run non-profit is its user-friendly consistency. With no extra passwords to remember for multiple platforms, each user can have their own account and an administrator sets permissions. This is very useful when bringing in new volunteers, as privacy and security must be taken into consideration.

Volunteer Management Software

" Integrated systems will favor one form of management over the other. Don't consider budget, but the priorities of the organization: if volunteer-based, volunteer management should be your top priority" (Jayne Cravens, Coyote Communications, from Idealware, 2011).

Groups with a larger volunteer base may find standalone volunteer management systems useful. If a group seeks to schedule several hundred volunteers, the more sophisticated standalone tools could save substantial time in trying to match volunteers to jobs. For organizations with a full-time volunteer manager (who may themselves be a volunteer), a robust volunteer management program could make their lives considerably easier (Idealware, 2011). These specialized programs are often customizable and offer a large range of online functionality. Large grassroots groups would likely benefit from this most, often needing to manage a large number of volunteers at once.

When comparing standalone and consolidated systems, there is a surprising similarity in available features. More and more CMS vendors are developing functionality or add-ons to manage volunteers. As with most software decisions, groups should start by looking at their current system and come to a realistic understanding of their capacity, taking into account their financial situation, the technological proficiency of their users and their unique needs.

Volunteer
toronto

CHARITY
VILLAGE

Local Agencies

techsoup

VOLUNTEER
BÉNÉVOLES
CANADA

THE
CANADIANCODE
FOR VOLUNTEER INVOLVEMENT

Community
Development Workers

Community Hubs

Imagine Canada

College
/University Volunteer
Management Courses

Networks/
Partnerships

Another
Volunteer Centre

Other

How
do they support
their volunteer
engagement/
management?

Website

According to a recent study on Canadian non-profits, "your website is your most important tool. It builds support, and raises you money" (Good Works, 2014). Having a website has never been easier or more affordable. Beyond contact information and a basic explanation of the organization's mission, websites should be updated with upcoming events and provide prospective volunteers with information about opportunities, how to get involved (if there is a specific process for new volunteers) and a clear statement as to why they should. Volunteer-run groups may opt into which features are manageable, based on their specific needs and capacity.

A recent study by M+R (2015) indicated that an average of 28% of visitors to small non-profits' websites completed a donation. This is a much higher percentage than that of medium and large organizations, which is considered to be a result of the people viewing the website being particularly interested in the cause. The report goes on to note that visitors to small organizations' sites were twice as valuable as visitors to medium and large organizations in terms of dollars donated per website visit. Thus, a website with the capacity to receive donations can be a profitable endeavour for grassroots groups.

Social Media

One of the important lessons to emerge out of Imagine Canada's (2012) National Engagement Strategy was the importance of ongoing communication as a way to ensure continued engagement, with the use of social media playing an important role. The fears that some non-profits have about technology can be addressed through learning from early adopters, who can provide the necessary safety net to allow organizations to experiment and innovate (Imagine Canada, 2010). This would also help to alleviate fears about what might happen if the technology were to fail or if attempts to engage stakeholders online were unsuccessful (Imagine Canada, 2012). Aside from these concerns, groups may be rightfully apprehensive due to the backlash that can occur when inappropriate public posts find their way into social media content. According to Hanberg (2011), small organizations and large ones alike experience this, often accidentally, as a user mixes up their personal account with the organization's. Free social media management apps, such as Hootsuite or different browser apps to separate accounts, provide an easy solution to this issue.

Social media is becoming more and more important, as has been clearly demonstrated in studies on technology in the non-profit sector. This trend is evidenced by the fact that "while email list sizes grew by 11% in 2014, the audiences of Facebook and Twitter grew by 42% and 37% respectively" (M+R, 2015, p. 41). When a social media strategy is executed correctly, it can be not only beneficial for volunteer-run organizations, but possibly essential to their longevity. Throughout the literature, five major functional elements which benefit from having a social media presence are identified: marketing, fundraising, program evaluation, networking and volunteer engagement.

If a group seeks to engage new volunteers online, there is a strong consensus within the literature that an active social media presence and consistent, creative content is necessary (e.g., Kapin & Sample Ward, 2013). Case studies show groups have had significant success with recruitment of young volunteers by using social media. By 2009, an American study showed 72% of 18-29 year olds were active social media users (Perrin, 2015). Since then, this figure has risen dramatically to 90% in 2015. Other research indicated consistent growth across all demographics at an average rate of 14% per year (Good Works, 2014; Kapin & Sample Ward, 2013). The major takeaway from the existing literature is that social media platforms are becoming increasingly ubiquitous and an impactful tool for volunteer organizations.

The rapidly growing user base of social media platforms provides an opportunity for volunteer-run organizations to promote volunteer positions and engage skilled volunteers. For many organizations, making the connection between needs and resources presents a substantial barrier to mandate execution. LinkedIn, a professional social network, has been praised for its capability to match skilled volunteers and pro bono professionals with groups seeking volunteers with specific skills and resources. With respect to costs, unlike Facebook or Twitter, LinkedIn has a paid version, but the needs of volunteer-run organizations can be readily served using the free membership, unless they have a specific focus on paid employment (Hsu, 2015).

Grassroots Growth

Focuses on short, but frequent content with emphasis on hashtags. Great for organization that broadcasts updates constantly.

- User-friendly free analytics
- Large existing base of users
- Mobile functionality

The world's most popular social network.
www.Facebook.com

Highly popular social network that focuses on small, 140 character posts.
www.Twitter.com

More towards highlight oriented (top tweets, top followers), tips to increase engagement.

Instagram doesn't have its own native analytic but there quite a number of third party options available.

Focus on mobile users. Based on photography useful to showcase products, display graphical promotion or for event coverage.

Business-oriented social networking service used for networking.
www.LinkedIn.com

Square photos and videos uploaded from mobile platform, with a majority of users under 30 years old.
www.Instagram.com

Useful for recruitments and serious discussion groups. Great for groups that specialize in an industry specific niche.

Solid analytics tool covering 3 major sections, Updates, Reach and Engagement.

Groups can create a page, that the public, and other groups can engage with by "liking" it. This will allow them to see posts and be invited to events, as well as engage in polls, and send private messages. Pages can monitored by multiple administrators, with options for 5 different levels of security permissions.

A visual social platform with a focus on content curation. www.Pinterest.com

Image based, both photography and graphics. Great platform to share infographics and graphical tips/how to's for groups.

Loop counts show the number of times a Vine video clip has been played and replayed.

Includes Pins metrics such as Impression, repins, clicks and likes.

Perfect opportunity for groups to showcase creativity and personality using only a smartphone.

Vine is a short-form video sharing service where users can share six-second-long looping video clips. www.Vine.com

Social Media, Which one is right for you?

Social media presents an opportunity for volunteer-run non-profits to showcase the contributions of their volunteers within the public realm. This provides current volunteers with recognition and thus incentivizes continued participation, as the ability to share a positive update on their own profile is a sought-after component for "managing the digital self" (Kapin & Sample Ward, 2013). Kapin and Sample Ward (2013), among others, note that general social media usage involves a lot of positive self-promotion and perception management. Individuals – especially job seekers – look to capitalize on having as much positive feedback attached to their digital footprint as possible.

Using social media allows a group to interact directly with current and prospective volunteers and that interaction provides opportunities to evaluate important areas, including volunteer experience, program quality and ability to serve a mandate. Social networking sites keep members engaged by letting supporters know in real time that their feedback is valued (Kapin & Sample Ward, 2013). Within the social platform, there is an opportunity to respond directly to feedback and gather input from volunteers, donors and other supporters. As organizations seek to grow, this information can be critical to moving in the right direction. Furthermore, according to Hanberg, "almost certainly, people are talking about your organization on social media" (Hanberg, 2013) and so groups without a social media presence are not capitalizing on this opportunity to engage users and participate in the conversation to shape their own narrative.

From a marketing perspective, online event promotion and social media campaigns are now considered fundamental tactics as marketing strategies must be fluid and continuous to resonate with audiences in the Digital Age (Claudino, 2011). The potential to engage users in real-time and disseminate information to large groups, using minimal effort and a limited budget, allows volunteer-run organizations to optimize the constrained time they do have and efficiently expand their outreach capacity. To increase audience size and expand reach, groups can encourage volunteers to share content on their personal accounts; this increases promotion and possibly entices potential volunteers and donors. However, personal pages should not be the official voice of an organization (Hanberg, 2013; Kapin & Sample Ward, 2013).

Despite these benefits, social media can also be problematic if users do not understand best practices. Grassroots groups, which have a greater need to increase their marketing capacity, can and should promote their organization on their personal accounts. Although Hanberg (2013) makes this recommendation, he cautions that those in leadership positions must be very mindful of appropriateness and professionalism. For example, a group's Executive Director has a role to play as a spokesperson and thus they need to ensure their personal social media accounts are reflective of the values of their organization, and should avoid posting deeply partisan political opinions as it could dissuade potential volunteers and donors.

According to Mogus (2011), new non-profits in particular are looking to collaborate and share knowledge with peers more effectively. Potential partnership and networking opportunities can form in social networks, as other groups with similar goals and areas of focus may happen upon, or be directed to, content that is in line with their own. Kapin and Sample Ward (2013) echo this sentiment and expand on it, noting that groups can tap into networks that can provide specialized support and unique opportunities. Social media platforms provide a virtual meeting space for groups to interact with each other and cooperate to work towards mutual goals.

Analysis of Original Research

Approach

In order to better understand the specific needs and challenges faced by grassroots groups across Ontario, the Grassroots Growth team carried out extensive original research to expand on the information already available about volunteer management and volunteer-run organizations. The project staff used several information-gathering approaches to determine the needs of these grassroots organizations: agency consultations, focus groups, key informant interviews, an online survey and case studies.

The five research methods outlined above resulted in a large amount of qualitative data. The findings for each method were analyzed separately, using thematic analysis to identify the most common needs and challenges faced by volunteer-run groups. The results were then aggregated to determine the most common themes across all research methods and all stakeholders. Since qualitative data comprised the bulk of the information under review, the thematic analysis was the main source for the identification of themes. However, a small amount of quantitative data from the survey was also taken into account. The analysis was performed by the project's Researcher/ Educator, Nimira Lalani, and Volunteer Toronto's Director of Engaging Organizations, Melina Condren, in consultation with other project staff. Below are the twenty themes that emerged most frequently from the project's original research, in descending order beginning with the most common.

Dealing with
Difficult Volunteers

Networking, Mentoring
and Partnerships

General Technology

Accessing Space

"We need to move into
the 21st century
with our technology."

#General Technology

Planning

"We are concerned
about moving forward
our mandate with the
current small group
of volunteers. We need
to figure out how to
engage more people in
the work."

#Recruitment

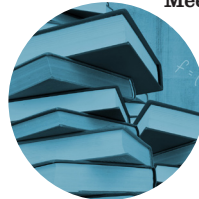Assigning Work

Basic Volunteer
Management

Facilitating
Meetings

Advocacy with
Decision Makers

Program and Project
Management

Difficulty Identifying
Existing Resources

Overburdened
Core Volunteer

Training and Orientation
for Volunteers

Inspiring Followers

"Our main challenge is
getting new volunteers;
they say they are inter-
ested but then they don't
show up."

#Lack of Commitment
and Reliability

Recruitment

"When you see them
face-to-face it's fine, but
people generally don't
check their emails."

#Communication

Funding

Evaluation

Communication

Lack of Commitment
and Reliability

We've
Found

20

Themes.

Governance and
Structure

Grassroots Growth

Twenty Common Themes

1. GOVERNANCE AND STRUCTURE

The most common theme by far among agencies working with grassroots groups was the need for information about governance and structure. This was confirmed by grassroots representatives themselves. There is a clear need for training on topics such as Board roles and responsibilities, different governance models, incorporation, trusteeship and policies. These topics not only affect how a group's core volunteers function, but also determine many aspects of the group's approach to expanding and engaging support volunteers.

2. FUNDING

Across all research methods, but particularly during consultations and focus groups, acquiring funding was cited as a major challenge for grassroots groups. Groups are interested in learning about grant-writing, sponsorship and crowdfunding, among other topics related to acquiring and managing funds. Several people also mentioned wanting access to a database of funding opportunities. Unfortunately, this topic is not within the scope of the project, since it is not directly related to volunteer management.

3. RECRUITMENT

Among survey and focus group participants, recruitment was the most frequent challenge brought up. Although agencies working with grassroots groups did not mention recruitment frequently, they did acknowledge it as a need. Groups that want to expand know that they can only do so by recruiting more volunteers, but many find it challenging.

> **"We are concerned about moving forward our mandate with the current small group of volunteers. We need to figure out how to engage more people in the work."**
> **– Survey Respondent**

Groups also reported a need to recruit skilled volunteers, something that may be particularly relevant for grassroots groups since so many specialized roles tend to be taken on by paid professionals in larger non-profits. They also expressed interest in engaging youth volunteers and recruiting Board members.

4. COMMUNICATION

Good communication strategies were identified through each research method as a necessary component of successful grassroots volunteer engagement. Participants discussed the need for social media training, a strong online presence and solid outreach strategies. In addition to the group's external communication, ongoing communication with their volunteers was also addressed as a challenge.

> "When you see them face-to-face it's fine, but people generally don't check their emails."
> – Focus Group Participant

5. LACK OF COMMITMENT AND RELIABILITY

Although this topic came up very rarely in the consultations, when volunteer-run groups themselves were asked about challenges, a lack of commitment and reliability from support volunteers was one of the most common responses. Groups reported people expressing interest in volunteering but not showing up for shifts, or committing to a project but missing deadlines.

> "Our main challenge is getting new volunteers; they say they are interested but then they don't show up."
> – Survey Respondent

In the survey, retention was one of the two most popular training topics listed. In groups that are entirely volunteer-run, high turnover and last-minute cancellations can have serious consequences; one group mentioned that when volunteers fail to show up, it can mean that events cannot take place. Another pointed out that time and resources—very limited commodities for grassroots groups—are often invested into training new volunteers, who then fail to contribute to the group.

This problem seems to affect some groups more than others; certain groups reported having a large number of very passionate and dedicated volunteers, while others reported dedicated core members but a lack of commitment from their extended volunteer network.

6.

OVERBURDENED CORE VOLUNTEERS

Many people talked about a small group of volunteers doing all the work. This was discussed in terms of burnout, being overwhelmed and wanting to encourage more volunteers to take on leadership roles.

> "Our volunteers are happy to join a one-off project, but we need more people to volunteer for leadership positions so we can run and manage more projects. And once they do that, we need them to stick with it"
> – Survey Respondent

Although very few people mentioned succession planning directly, the fact that so many groups are run almost entirely by a small number of over-worked volunteers suggests succession planning would be useful.

> "The same small group does the most work (typical problem) but when one leaves, the organization is left scrambling"
> – Survey Respondent

7.

NETWORKING, MENTORING AND PARTNERSHIPS

Learning from peers through mentoring and networking were frequently cited as a crucial source of support that grassroots groups often lack. In fact, several participants mentioned that mentorship and information sharing between peers is often more important than receiving training.

> "Networking opportunities allow members to feel they aren't alone and know the experiences are shared."
> – Focus Group Participant

Networking and mentorship relationships can also lead to partnerships, another topic that was brought up as a potentially pivotal opportunity for grassroots groups. Collaborating to reach common goals more effectively, sharing resources, or partnering with a larger organization to qualify for services unavailable to unincorporated groups were all believed to be important training topics by participants.

8. PLANNING

Planning, in many forms, was frequently cited as a need by our research participants. Agencies working with grassroots groups focused heavily on the need for strategic planning as a means to improve programs and stay focused on goals. Representatives from grassroots groups often focused on their difficulty planning ahead, resulting in poor time management and important decisions being made at the last minute.

> "We hold a lot of events and we don't have a defined strategy going in, so it's all done mostly ad hoc."
> – Case Study Participant

9. BASIC VOLUNTEER MANAGEMENT

Not having a designated volunteer manager or enough basic volunteer management expertise were cited as major challenges by a few representatives of grassroots groups. The theme was more common among agencies working with grassroots groups, who pointed out that it rarely occurs to groups to give much consideration to volunteer management and that they may not understand what it entails.

> "Explain all aspects of what "volunteer manager" actually means—groups never consider this in their structure."
> – Consultation Participant

Many agency and grassroots representatives also cited a need for general volunteer management or HR support in order to help groups run more smoothly.

10. DEALING WITH DIFFICULT VOLUNTEERS

Several representatives of grassroots groups described having difficult volunteers who were unwilling to collaborate or follow instructions and having tension between members of their group without a clear way to resolve it. Agencies working with grassroots groups cited conflict resolution more broadly as a challenge that needs to be addressed.

11. PROGRAM AND PROJECT MANAGEMENT

Participants across all research methods outlined a need for improved program and project management, including general project management skills, how to prioritize, schedule and delegate tasks and how to use project management tools and software.

12. INSPIRING FOLLOWERS

Many representatives of grassroots groups discussed the desire to be able to inspire people to join their cause, or keep them motivated once they start volunteering. They also expressed a wish to simply find others who shared their passion, who would be internally motivated to contribute.

> "To find people with the same passion you have. Find people who are driven to keep going, because it's inside of you."
> – Focus Group Participant

Since grassroots groups often rely on a charismatic leader and since people who volunteer for grassroots groups often do so because they are passionate about the cause, being able to inspire followers seems to be a key factor leading to groups' success.

13. ASSIGNING WORK

Representatives of grassroots groups often spoke of challenges assigning work to volunteers. Some mentioned wanting to learn how to create position descriptions so that volunteers would have clear roles, while others discussed their need to better determine the skills of their volunteers and match them with appropriate tasks. Some organizations have too many volunteers without enough work, while others struggle with too much work for too few volunteers. Scheduling shifts was also mentioned several times as a major challenge, since many volunteers have full-time jobs and other commitments that need to be taken into account. Based on our research, it is clear that deciding who will do which tasks and coordinating the scheduling and supervision of those tasks is very challenging without a designated volunteer manager.

This theme also arose in relation to incorporation; some groups reported having difficulty assigning the roles that are required of incorporated non-profits, such as having a treasurer on their Board of Directors.

14.

TRAINING AND ORIENTATION FOR VOLUNTEERS

Volunteer orientation and training is a traditional volunteer management topic, but one that seems to be overlooked by many grassroots groups. Agencies working with grassroots groups cited a need for better volunteer training among grassroots groups and representatives of the groups themselves mentioned the difficulty of training and orienting volunteers due to limited time and resources. When survey respondents were presented with a list of training topics, Volunteer Orientation and Training was selected as one of two topics that would best meet their needs.

15.

FACILITATING MEETINGS

Based on the feedback we received from grassroots groups, it appears that much of their work is often completed during meetings with core volunteers. Facilitating those meetings was identified as a major challenge by grassroots groups and the agencies that work with them. Being able to run more effective meetings could significantly increase grassroots groups' impact, while also improving the experience of their volunteers.

16.

ADVOCACY WITH DECISION MAKERS

Agencies working with grassroots groups focused heavily on their need to establish relationships with elected officials and influence other decision makers. They cited a need to understand and navigate bureaucracy in order to make this possible. Grassroots groups supported this theme by stating a desire to learn how to talk to politicians and gain government support.

17.

GENERAL TECHNOLOGY

The use of technology was acknowledged as a necessary component of successful grassroots functioning, but many groups seem to feel that their understanding and use of technology is not sufficient.

> "We need to move into the 21st century with our technology."
> – Survey Respondent

Grassroots groups explained that often their volunteers are not technologically savvy and would require training to improve their skills. They were concerned that technology is progressing at such a rapid pace that its use is changing constantly; something that is difficult to predict and remain informed of. They know that there are resources they are not aware of, but are not sure which ones are worth pursuing. Agencies working with grassroots groups agreed that technology is a major need, citing both general technology and database management specifically.

18.

ACCESSING SPACE

As mentioned previously, much of the work of grassroots groups is accomplished during meetings. However, accessing space for those meetings is a major challenge. Agencies working with grassroots groups pointed out that acquiring space for free, with flexible hours, that can be used for meetings and other activities can be incredibly difficult. Accessing regular office space can be even more challenging. Representatives from grassroots groups also expressed these challenges, in addition to the fact that they do not know where to look for space and that they struggle with not being able to book space for long enough to accommodate their activities.

19.

DIFFICULTY IDENTIFYING EXISTING RESOURCES

Many organizations working with grassroots groups pointed out that a wealth of resources on volunteer management and other topics specifically relevant to grassroots groups are available, but that locating them may be difficult or time consuming, a fact which representatives from grassroots groups confirmed. In addition, several people pointed out that grassroots groups often do not know where to start looking for resources, because they do not know what they need until it comes up.

> "We are just starting out and to be honest we are not even aware of resources for our organization."
> – Survey Respondent

> "We know there are resources, but we don't know how to access them."
> – Focus Group Particapent

20.

EVALUATION

Grassroots groups expressed a need to learn how to collect data to assess and communicate their impact, as well as a desire to collect feedback from their volunteers. Agencies working with grassroots groups identified a need for program evaluation tools, information and support.

> "Even talking about this, I realize we need to do more evaluation. I didn't recognize we have some of the problems we do."
> – Case Study Particapent

RaBIT founder, Dave Meslin

Ranked Ballot Initiative of Toronto (RaBIT)

Ranked Ballot Initiative (RaBIT) is a volunteer-run, non-partisan advocacy project founded in 2010. They are proposing a small, simple change that would make Toronto's elections more fair, diverse, inclusive and friendly. By promoting Ranked Choice Voting they hope to encourage positive campaigns, increased voter choice and eliminate vote-splitting and strategic voting.

Challenge

OVERBURDENED CORE VOLUNTEER(S)

The group initially relied heavily on the charisma of its founder, Dave Meslin, who was the face and voice of the organization. RaBIT committed to diversifying its leadership, decentralize decision making, and planned for future growth. It dedicated an entire year working on leadership transtition and a new governance structure.

www.RaBIT.ca

Environmental Scan

The Grassroots Growth project must consider the scope of currently available resources that would be relevant to the target groups, and their availability/accessibility needs, when determining appropriate topics for our resources. This is key to avoiding duplication, as we seek to fill specific gaps, not to "reinvent the wheel." We have sought to understand the breadth of topics, as well as the format (books, webinars, etc.), the relevance to grassroots groups specifically and the costs associated.

Canadians Navigating US Resources

There are considerable print resources available for English-speaking non-profit groups. Often, these resources emerge from particular locales: most information on non-profit sports groups comes out of Australia, while the majority of other print resources are US-centric. Few resources are currently available from the UK or Canada.

Diverse audiences can benefit from the general information contained in these publications: tips on developing mission and vision statements, how to effectively structure organizations to suit individual group needs and when and how to manage volunteers are useful to a wide variety of grassroots groups. However, some information is specific to place. For example, details on incorporation, filing taxes, and locating appropriate insurance policies are also frequently included in American texts. This information is valuable to US readers, but irrelevant to Canadian grassroots groups.

While Canadian content does exist, the resources are limited to a few print publications and online materials. Quality information on the specific processes for incorporating, registering as a charity, and filing taxes in Canada are integral to the success of groups that choose to incorporate and professionalize, and some current resources can pose more barriers than they remove. For example, information on government websites frequently uses legal terms to explain procedures and can therefore be challenging to understand. Additionally, while details about Canadian processes are also located on other, more accessible websites, the nature of online information means that these sites are not consistently reliable. As a result, grassroots groups in Canada must regularly spend time determining the validity of their sources in order to find useful materials, or risk moving forward with inaccurate information.

The lack of resources specific to Canadian grassroots groups points to the need for additional information that is both easily accessible and reliable. Without these resources, grassroots groups can face challenges when trying to establish and grow their organizations.

Variety of Topics

The Grassroots Growth project aims to provide training and resources on topics that have been identified as challenges for grassroots groups for which sufficient resources do not already exist. We therefore researched the trends from the literature and the themes from our original research to identify gaps in available resources. Only one trend and one theme were not included in our scan of existing resources. Youth-led initiatives and the availability of Millennial volunteers, while an important trend, did not appear to pose any particular challenge related to volunteer management for grassroots groups. We will take the trend into account when developing training and resources, since youth leaders are likely to be represented among our audience. Funding was also excluded from our research into existing resources, since it falls outside the scope of this project.

GENERAL NON-PROFIT RESOURCES

Several themes identified in our research are challenges faced by the non-profit community at large and resources to address those challenges are available. However, those resources often do not take into account the particular needs of grassroots groups. For example, many of the representatives of grassroots groups who participated in our research noted that their groups struggled trying to spread workloads beyond a few overburdened core volunteers. They spoke of being burnt out and of being under a significant amount of pressure and stress due to their leadership roles within their groups. Many general resources exist to help people cope with stress and engage in self-care, from workshops and webinars to books and blog posts. However, no resources that we were able to identify specifically focus on how to avoid overburdened core volunteers in a grassroots context through planning, delegation, self-management, or encouraging other volunteers to take on leadership roles. Although some grassroots scholars refer to "Founder's Fatigue," they often do so merely to describe it as a risk and a challenge rather than to help groups cope with its results.

Planning is also a skill required in larger non-profits, as well as the small volunteer-run groups this project seeks to serve. Many resources on strategic planning for non-profits exist, including books, workshops and consultants. However, all of those resources tend to come with a fee, which is often not within the limited budgets of grassroots groups. They also often assume a basic level of knowledge of strategic planning, which leaders of grassroots groups may lack; in fact, based on our research, grassroots leaders may not know what type of training or resources would be helpful to them and would not necessarily seek out "strategic planning" support. In addition, grassroots groups may require information on more basic planning techniques specifically related to working with less time and resources and less formal structures than larger non-profits.

Facilitating meetings is another skill that can be learned through several books, blog posts and webinars, but only in the context of larger non-profits. These resources generally assume that meetings are taking place as part of a larger work day, but for grassroots groups, meetings are often the driving force of all work. Even resources focusing specifically on board meetings cannot generally be applied to grassroots groups, since many groups have less formal structures and the responsibilities of boards vary greatly based on the size of an organization.

TRADITIONAL VOLUNTEER MANAGEMENT TOPICS

Several of the themes identified fall under the broad category of traditional volunteer management topics: recruitment, lack of commitment and reliability, inspiring followers, basic volunteer management, assigning work, dealing with difficult volunteers, training and orientation for volunteers and evaluation. A wealth of training and information is already available about traditional volunteer management topics, most of which comes from four main sources: Volunteer Centres, Professional Associations, Professional Standards, and Sector Publications.

There are over 25 volunteer centres in Ontario, and over 200 across Canada. These volunteer centres provide a variety of services for non-profit organizations, often including access to a volunteer board to recruit volunteers and access to volunteer management training. For example, Volunteer Toronto provides monthly volunteer management workshops, discussion groups for volunteer managers, an online resource library, an online learning centre, and an annual volunteer management conference. The type and amount of training differs from one volunteer centre to another, and many smaller volunteer centres provide no training at all. There is typically a cost to access training, although that cost varies widely.

Volunteer managers wishing to enhance their skills and connect with their peers have the option of joining a professional association. Those wishing to join a large professional network in Ontario can join the Professional Association of Volunteer Leaders Ontario (PAVRO) or the Volunteer Management Professionals of Canada (VMPC). In addition to these large associations, there are several local Associations for Volunteer Administrators (referred to as AVAs) across Ontario. Professional associations serve as a community of practice for their members, and often have training and mentorship opportunities, including annual conferences.

Professional standards for volunteer engagement exist from two main sources in Canada: The Canadian Code for Volunteer Involvement (CCVI) and the National Occupational Standards for Managers of Volunteers. Both offer standards of practice relating to preparing for, recruiting, training, supervising and recognizing volunteers. They are both available for free online, and provide a quick and clear overview of best practices for professional volunteer engagement.

In addition to formal training and professional development, a great deal of information about volunteer management is available online through sector publications. Websites such as CharityVillage, Volunteer Match, Blue Avocado, Non-Profit Ready and Energize Inc. have many articles and blog posts about different aspects of volunteer management. While those articles are free, each company is also promoting paid services for volunteer managers, such as professional development courses and consulting. The information included in the free resources tends to be relatively limited rather than comprehensive, in-depth training. For more extensive information, volunteer managers can turn to more academic sources, such as volunteer management journals, and the evidence bank of the Institute for Volunteering Research (based in the United Kingdom).

Although there is a great deal of information currently available on traditional volunteer management topics, very little, if any, combines being specifically targeted to grassroots groups, being inexpensive or free, providing in-depth and practical instruction, and being presented in accessible ways for non-professional volunteer managers. The lack of applicability to grassroots groups is particularly noteworthy. Volunteer Centres and Professional Associations tend to produce training and resources aimed at professional volunteer managers. Professional Standards focus specifically on professionalizing the work associated with volunteer management. Sector publications, from blogs to academic articles, are sometimes aimed at a broader audience and occasionally even aimed at small non-profits specifically. However, based on the results of our search they rarely take into account the fundamental elements that make volunteer-run organizations unique. As we have stated throughout this report, the professionalization of volunteer management cannot, and should not, be applied to volunteer-run groups (Ockenden & Hutin, 2008). Because of this, the training and resources currently available for traditional volunteer management topics are largely inapplicable for the target audience of this project.

TECHNOLOGY

A significant trend in recent years has seen an explosion of technical resources, including how-to guides and best practices, research reports, academic articles, webinars and social media resources related to non-profit management. In spite of technological demands emerging as one of the drivers of change, this is not necessarily always being matched by the capacity of non-profit organizations (Hall et al., 2003; Imagine Canada, 2012).

In spite of concerns and barriers, with new technology comes a new opportunity to engage with communities and conduct outreach and networking: it represents an often-untapped area with a lot of room for capacity-building. Grassroots organizations are beginning to recognize this, and as such, some groups are leagues ahead of others when it comes to utilizing digital tools and developing a web presence. In terms of available resources, this means that groups with a higher level of digital proficiency and experience with Web 2.0 can take much better advantage of currently available resources, as they can easily adapt best practices (including those designed for larger non-profits) to suit their individual needs.

There is a growing trend in the not-for-profit sector of marketing companies and consulting firms reporting on how non-profits are using web tools. Some of the best resource sites including Non-profit Technology Network and Techsoup have collaborated with marketing firms to publish annual reports that examine usage data from a wide range of non-profits and charities, and these reports are often available for free to download. These reports have been extremely valuable for the purposes of the literature review and some could serve as resources for grassroots groups themselves, due to their use

of accessible language, helpful glossaries, size-specific data breakdowns and contextualizing of information based on organization size. In some cases, the reports explicitly mention that they can provide guidance to groups without an existing online presence, while remaining relevant to groups looking to improve their existing one. Grassroots groups, especially those with an existing level of technological proficiency and a basic web presence, could benefit greatly from accessing these reports annually, as it would help them keep their web strategies up-to-date with current trends and the rapid pace of the Web 2.0. world.

The clear gap that exists is not necessarily related to topics within the broad field of technology, but for whom the resources are designed. A small number of websites, such as Socialbrite, have more elementary resources than most, but as it stands there are very few simple guides and easily accessible materials for groups with a low to moderate level of technological proficiency.

PROGRAM AND PROJECT MANAGEMENT

Many resources and training opportunities exist to help those in the private sector learn professional program and project management, and a limited number of resources also exist focusing on this topic in the non-profit sector specifically. However, these resources are designed for those managing programs and projects full-time, in a professional setting. They do not take the needs of grassroots groups into account, such as limited time and resources. In general, grassroots groups may not need training in professional program and project management as much as they need simple tools that they can apply to their existing work style.

Online tools such as Trello, Azendoo, Asana and Wrike are increasing in popularity, as they are specifically designed to be collaborative. There are certainly advantages for grassroots groups in terms of simplifying task delegation and setting goals. Unfortunately, there do not appear to be any resources, aside from comparative business articles and promotional materials, on how they would be helpful for groups. It is a rather new concept, but there is potential to adapt the best practices and recommendations for these tools that are more focused on businesses (particularly small businesses) into simple instructive guides to help grassroots organizations apply them to their projects successfully.

CYCLES OF RESTRUCTURING AND CHANGE

Although cycles of restructuring and change emerged as one of the most significant themes in our literature search, practical information to help grassroots groups through the process is difficult to find. Large organizations going through restructuring and change often rely on professional consultants, but grassroots groups seldom have the option to hire someone to help them through the process. Books such as Burke's (2014) *Organization Change: Theory and Practice* contain a wealth of information, but they are expensive, hard to understand for non-experts and tend to be more business- than grassroots-focused. Academic articles focusing on restructuring and change in grassroots groups are only now becoming popular, the most relevant being published in the *Journal of Community Practice*. However, these articles remain rather rare, are quite costly, and serve a more academic than hands-on purpose. As a result, they are not typically practical resources for grassroots organizations.

Resources on restructuring and change that are simple, practical, accessible, grassroots-focused and low-cost or free have not been made available to grassroots groups. This major gap in the sector means that restructuring and change, processes that affect most groups at some point in their development, are often taking place without support in the grassroots community.

GOVERNANCE AND NEW STRUCTURES

Throughout the research process, it has become quite apparent that grassroots groups need to spend more time developing and implementing a governance strategy. There is currently a wealth of academic resources on the subject of grassroots governance and structures. Unfortunately, very few of these resources are easily available without access to a University library, unless groups can afford the high cost of academic publications. In addition, most of these articles are not directly relevant for the type of groups this project seeks to support and they are not written in clear and simple language.

Books, many of which can be accessed for free through the public library system, appear to be the most accessible resources for grassroots groups to learn about governance. Many of these can be accessed for free through the library system in Toronto, but may not be as easily obtainable for groups across the province. However, most of these books are collections of academic articles, like *Nonprofit Governance: Innovative Perspectives and Approaches*, which, although helpful for our literature review, would not be simple for grassroots groups to understand. One notable exception is Erik Hanberg's *The Little Book of Boards: A Board Member's Handbook for Small (and Very Small) Nonprofits*, available online for less than $20.

Another gap in existing resources is the general focus on professional structures and expansion. Existing resources still focus mostly on board structures and operate with the assumption that groups want to expand into much larger non-profit organizations. As we have learned through our research, this is not always the case, as groups may want or need to adopt informal structures that suit their mandate and the needs of their core volunteers.

INCORPORATION

Incorporation is a complicated legal process which can be extremely intimidating and challenging. In our own research, we discovered that groups who had undergone the process had done so with the support of personal connections, or happened to have the skills and experience to understand the requirements themselves. Many groups, without the existing knowledge or networks to help them navigate the process, require clear and simple resources to guide them.

In Ontario, the Ministry of the Attorney General offers a guide to the process available online, titled "*The Not-for-Profit Incorporator's Handbook*." Although there is a significant and thorough explanation of the guidelines and requirements, there are currently no available resources for grassroots groups in Ontario to assist with determining whether or not incorporation makes sense in the first place. Aside from this government guide, "*Starting and Maintaining a Charity in Canada*" by lawyer Adam Aptowitzer (2014) is extremely detailed, but is rather expensive and focuses more on the application process than helping groups to weigh the pros and cons to figure out what route would be most appropriate for their unique needs.

REMAINING THEMES

A few themes emerged from our research for which we were unable to find any existing resources that would be easily accessible for most groups. Working with other grassroots groups was a theme in both our literature review and our original research. Although some networking events for grassroots leaders currently exist, particularly in urban areas like Toronto, resources explaining why collaboration is important, what form it can take, and how to develop partnerships are not currently available.

How to advocate with decision makers was a concern for many grassroots representatives who participated in our research. Unfortunately, we were unable to find any resources helping grassroots groups determine who they should approach for support, and when and how to do so.

Finally, a major challenge for the grassroots groups participating in our research was accessing space that is free and meets their group's needs. We were unable to find any resources aimed at helping groups understand what type of space might be available to them and how to access it.

FINAL CONSIDERATIONS

Research into the scope of currently available resources has led to the conclusion that some of the topics grassroots groups are most in need of are already covered in some detail, and available either for free or at a modest cost. It is often a matter of awareness that prevents groups from utilizing these tools. This lack of awareness is the rationale for developing the Grassroots Growth Wiki, a resource directory which users can browse and to which they can contribute new material. This is especially convenient when considering the rapid rate at which technology—particularly social media—is evolving. With limited time and resources, grassroots groups are most susceptible to falling behind, and the Wiki will serve as a simple way to share new information between groups.

SUMMARY OF RESOURCE GAPS

Our scan of available resources can be summarized with the identification of six major gaps:

1. General non-profit and volunteer management resources do not take the unique needs, challenges and structures of grassroots groups into account and therefore cannot be applied to the majority of the groups this project seeks to serve.

2. Few Canadian resources exist, which is particularly problematic for groups who want to professionalize and need information related to local laws and requirements.

3. Many groups do not know what type of training they need, or require help making decisions such as whether or not to incorporate. Existing resources do not help them understand their needs within a context that acknowledges the unique challenges of the grassroots sector and their group's individual goals.

4. Very few simple, accessible resources exist to help groups understand restructuring processes, governance and professional structures. No resources exist to help them understand informal structures.
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5. Existing technology-related resources are not sufficient for groups with low to moderate technological proficiency.

6. No resources exist for a small number of trends and themes: applying simple tools to manage projects more effectively, forming partnerships with other grassroots groups, advocating with decision makers, or accessing space.

Case Study

RaBIT founder, Dave Meslin

witopoli

Women in Toronto Politics (WiTopoli)

Women in Toronto Politics is a non-partisan grassroots group that supports and amplifies women's voices in municipal civic discourse. By supporting women's engagement in municipal politics, with a focus on improving civic awareness in priority communities, and fighting for equity for women in political spaces.

Challenge

PROFESSIONLIZATION AND INCORPORATION

As a relatively new organization, they are unincorporated, and struggling with the question as to whether or not that makes sense. After some recent successful projects, it became clear that there was another need to re-structure, as a result of the significant increase in volunteer interest. To accommodate this fast growth, the group spent time deciding on a membership model, fundraising targets and a structure.

www.witopoli.ca

Grassroots Growth Training Topics

Based on the themes that emerged from our research and the gaps in existing resources and training, we have identified eight topics that will become training modules made available to grassroots groups across Ontario. The eight modules will be combined to form four workshops with an accompanying training manual for each module.

The four workshops developed for the Grassroots Growth project will follow the development trajectory of many grassroots groups, from establishing the group and working with core volunteers to expanding and managing a large group of support volunteers. The workshops will be able to be used as stand-alone training sessions for groups interested in a particular topic or phase of development, or they can be used as a complete series for groups interested in learning about all aspects of engaging and working with grassroots volunteers.

Workshop A: Grassroots Governance: Building a Structure that Fits

MODULE 1: DEFINING YOUR ORGANIZATION

This module will explore different governance models, including hierarchies and collaborative models. It will address the need to define a purpose and design a mission statement, the roles and responsibilities of Board members and how to create governance documents. These issues are essential in order to determine how the organization's initial core volunteers will work together and in order to build a strong foundation for future volunteers to be engaged in meaningful, mission-driven work.

Trends addressed from the literature: Good Boards: Professional and Corporate Governance Models, Cycles of Restructuring and Change, Governance Models and Structures: New Approaches

Themes addressed from original research: Governance and Structure, Planning, Assigning Work

MODULE 2: BECOMING LEGITIMATE

Appearing to be a well-organized and trustworthy organization with systems and structures in place to keep volunteers safe and the work of the organization on track is essential for any organization hoping to attract volunteers and maintain momentum. This module will explore the pros and cons of incorporation, as well as other aspects of becoming a "legitimate" organization.

Trends addressed from the literature: Good Boards: Professional and Corporate Governance Models, Cycles of Restructuring and Change, Governance Models and Structures: New Approaches, Choosing to Incorporate… Or Not

Themes addressed from original research: Governance and Structure

Workshop B: Managing the Core

MODULE 3: AVOIDING BURNOUT

Grassroots groups often have a small group of extremely dedicated volunteers who do the majority of the work, putting these groups at risk of losing core members to burnout. This module will help participants avoid burnout by learning to plan realistic goals, take on a manageable amount of work and delegate tasks to support volunteers.

Themes addressed from original research: Overburdened Core Volunteers, Planning, Assigning Work

MODULE 4: PROACTIVE APPROACHES FOR A STRONG CORE

Core volunteers need to work together in a cohesive and strategic way in order to ensure that their organization is and remains productive despite limited time and resources. This module will help participants understand how to maintain smooth and productive relationships among core volunteers, how to establish partnerships to share and access resources and how to use succession planning to be ready for the inevitable loss of core volunteers.

Trends addressed from the literature: Collaboration, Partnerships and Network-Building: Working with Other Grassroots Groups

Themes addressed from original research: Overburdened Core Volunteers, Networking, Mentoring and Partnerships, Dealing with Difficult Volunteers, Advocacy with Decision Makers

Workshop C: Expanding and Growth

MODULE 5: BUILDING A FOLLOWING

This module will help organizations build a dedicated base of followers using strategies that are proven and practical for grassroots groups, including creating a web presence that aligns with their goals and resources, choosing social media channels that they will be able to maintain and learning to inspire followers like the archetypical grassroots charismatic leader.

Trends addressed from the literature: Technology

Themes addressed from original research: Communication, Inspiring Followers, General Technology

MODULE 6: RECRUITING VOLUNTEERS

Since grassroots groups are powered entirely by volunteers, excellent volunteer recruitment is essential for any group that wants to expand and grow. This module will teach participants to assess their recruitment needs and will explore general recruitment strategies as well as targeted recruitment for leadership positions, skilled volunteers and millennials.

Themes addressed from original research: Recruitment, Assigning Work

Workshop D: # Leading Beyond the Core

MODULE 7: GRASSROOTS VOLUNTEER MANAGEMENT BASICS

Once groups have expanded by engaging volunteers beyond the core, they may find some traditional volunteer management strategies useful. This module will adapt basic approaches to traditional volunteer management in order to suit a grassroots context.

Themes addressed from original research: Basic Volunteer Management, Dealing with Difficult Volunteers, Assigning Work, Volunteer Training and Orientation, Evaluation

MODULE 8: THE LOGISTICS OF MANAGING MORE PEOPLE

Managing a large group of volunteers without the time of a dedicated volunteer manager or the resources of a large non-profit can be extremely challenging. This module will offer strategies to effectively cope with the influx of people that accompanies growth in a grassroots group, including tools and technology to stay organized, addressing issues of commitment and reliability, how to facilitate effective meetings and how to access space to accommodate your group.

Trends addressed from the literature: Technology

Themes addressed from original research: Communication, Lack of Commitment and Reliability, Program and Project Management, Facilitating Meetings, General Technology, Accessing Space

The workshops outlined above address all of the major themes from the literature review and all but two of the themes identified in our own research. Funding, which was one of the most common themes in our research, falls outside the scope of this project and will not be included in training. Difficulty Identifying Existing Resources was also a theme from our research that is not included in the workshops; it will instead be addressed by the addition of a Resource Directory on the project's online portal.

Case Study

Toronto Gay Football Leauge

Toronto Gay Football League - TGFL

The Toronto Gay Football League (TGFL) began in 2009 as a group of players coming together on weeknights to play pickup football games. The TGFL was created to give members of the Lesbian, Gay. Bisexual and Trans (LGBT) community and their allies a chance to play the game of flag football, regardless of skill or experience, in a comfortable, safe, and welcoming environment that is free from harassment, and where race, creed, gender, and sexual orientation are not an issue.

Challenge

PLANNING

As the awareness of the league and popularity of the sport grew, the TGFL has looked towards expanding the number of teams and divisions to meet the growing demand from the community.

TGFL has since evolved into a nine-team league with close to 150 players, and expanded to include a new women's division. To prepare for the new teams and the influx of new players, the organization needed to recruit new volunteers to execute the new growth plan.

www.torontogayfootball.com

Next Steps

The research presented in this report suggests that although grassroots groups make up a sizeable proportion of the overall non-profit sector, their volunteer management needs have so far been unaddressed and unacknowledged. Volunteer management is particularly important for these groups, since they are founded, run and expanded solely by the efforts of volunteers. Based on an extensive literature review and feedback from grassroots groups and the agencies that work with them, we have identified their most pressing volunteer management needs. The Grassroots Growth Project aims to address these needs through a series of four workshops and eight training manuals, as well as the creation of an online Community of Practice where grassroots groups can access resources and connect with their peers. The findings of this report will be used to inform the Grassroots Growth Project until its completion in March 2017.

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