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Good afternoon everybody, and welcome back. This is Richard Dolish here at the Forest Service headquarters with Jim Bedwell and Bill Woodland, and on the phone also with us is Dr. Jim Apshire from Pacific Southwest Research Station, Margaret Bailey from CHM Government Services, and Chris Komar from Double K Consulting, all of whom are presenters or speakers today and some of whom you've heard from and the rest you will in this second segment. We'd like to welcome all those back. If you haven't dialed in and you happen to be on line dialing now, you should have seen your – you will have your dial-up number. If you're not on line, you need to log back on. The dial in information in case you don't have it is 800-369-2114. Of course, you can't hear me if you're not on the phone right now. But anyway, we're gonna move to part number 2 of this segment. There are two very interesting presentations to close out our webinar today. First of all is Dr. Jim Apshire from the Pacific Southwest Research Station, and I'll talk about him and introduce him in a moment. He's gonna talk principally about volunteer management capacity and his study and research that he did on that and will amplify some of his findings, and then Margaret Bailey and Chris Komar are gonna talk about their report to the Forest Service on volunteer management models, a phase 1 report. Some very interesting new findings that all of us in the nonprofit and association world have found extremely interesting, and I think the volunteers and friends and partners that are on the call today are gonna really find some of their findings and conclusions interesting. Then we'll close out as we had the first session with questions and answers, so we'd like to remind you that through your chat feature feel free to post a question at any time.

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The more the merrier. We'll try to get to all of them. If we can't, the presenters have all said they'll try to respond afterward. As we mentioned earlier, the entire presentation is being recorded audio and web, so it will be available for those who are not able to participate today or others you think might find this interesting and valuable. We will also provide you some links to the three research reports and findings that we've referenced today and some other data and information that has been referenced and other volunteer services information that you might find useful. Well let me start. Jim, you on the line?

I am indeed.

Great. Let me give you a little bit of an introduction. Jim Apshire is research social scientist for the Forest Service. He has over 39 years of experience working in social science and natural resource management issues. He holds an undergraduate degree from Stanford University. His graduate degree is from San Jose State University in natural science, and the University of California at Berkley where he received his Ph.D. in wildland resource science. Previously before coming to the Forest Service, he held faculty positions at the University of Illinois, the University of Georgia, and the University of South Australia. The main focal points of his research have been customer service, carrying capacity, volunteerism, and the human dimensions of wildland and fire. He recently published work on recreation carrying capacity, recreation fees, volunteer management, ethnicity, and wildland fire defensible space behaviors. General

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Jim has concentrated his work on social science theories and models to better understand who uses our public lands, what they expect or perceive, how well their needs are being met, and the tools that managers have to facilitate appropriate use and management. So I'm very pleased to turn the program over to Jim now.

Okay. Thank you very much. Let's get beyond that scary picture as fast as we can. Basically, where we are at the research station, we try to do social science or science in general that can help make a difference for management. I think a lot of the material that's been covered in the last few slides, the last couple speakers, has given a lot of great direction to what I've been trying to do, and I will try not to repeat some of that, but let me just begin by saying that what I'm trying to do here is place the volunteer research that I've been doing in the broader perspective of philanthropy and giving and volunteering. My offering assumption has been and continues to be the environmental sector is different. It's not only small, if you do the numbers that we've been presented recently, you realize that the Forest Service volunteers, and there's like 1/10 of 1% of the volunteers in the United States, but it's also complex. You can see with all the things that Lisa and others have pointed out so far, and that it's rather inherently governmental. It's tied in with structures and what not, governmental structures, but a lot of the volunteering and philanthropy in the United States is not that way. So in doing this research, I'm going to go through basically what I've done so far. I started off by looking at volunteers themselves, and then I went into the

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volunteer management capacity issues and now I'm back again trying to look at the volunteers. A final note on that is the connection with the research event is simple. I am a US Forest Service employee. I am, for all of you who have FSUS in your E-mails, I am part of your research staff, so we want to generate the partnership, we want to work together so that we can utilize our ability towards your ends. Next slide.

So the first phase of what started about 11 years ago, and I actually wanted to do Forest Service volunteers cuz we have some wonderful ones here locally, lookout hosts, and wilderness volunteers and all sorts of things, but no one had a list of these things back then, so I went over to the California state parks and started working with them, and at that point the literature standard was _____, how to motivate and retain and certain things, something that still continues today, and we developed what we called the three-R approach, recruit, retain, and reward our volunteers. That work – Next slide please – went on for a while, and we focused mostly on an _____ of work I had done on information roles and visitor centers and interpretation, which is what I was doing at the time. And as I did that, it became very obvious that there are these significant differences. This slide, just taking them clockwise, gives you a breath of just the types of information roles that our volunteers do play for us. We're worried about visitor safety, K through 12, kids in the woods, fire messages, the defensible space of what we do, sales to support programs in the lower right there, environmental education and interpretation more generally, general information and permitting

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functions that we have at many of our staff offices is often done by volunteers, and of course we have a few visitor centers like the _____ one there, around the country where we just need general VC duties. So in part, the environmental giving is different in our area because of the complexity of the kinds of information that we give. Go to the next slide. I couldn't get information on the US Forest Service. I did the California state parks first. In this case, and this is instructed not because this was such a great study, but because it shows us a little bit about the way in which volunteering impacts what we do. If you look at this data, it's a little old but it tells you that 62% of all those California state park volunteers in the upper right-hand corner were doing some sort of information duty, interpretation, public contact, campground hosts, and all sorts of things. Then on the bottom staff, they added up all the hours and programming that was done by volunteers and by rangers and interpreters and what not, and of course they have many more interpreters for a hundred employees than we do. It still was the case that more than half of all the programs that were being done were being done by volunteers, and that gave us two important messages to be aware of. One, volunteers were often the face of the agency. They replaced staff. That's kind of the only point of contact the people are gonna see, and volunteers are not just an add-on but essential to the mission of the agency. So with that in mind, I proceeded to move back – next slide, thanks – and look at the other functions that we were using volunteers for and asking myself how can we better understand the way that Forest Service uses volunteers, and with thanks on this slide to the BLM and Public Land Institute at University of Nevada, Las Vegas, I

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just borrowed their slides for this rather than generate new ones, but the environmental land management issues that we deal with are things that are not well represented. All of the other literature that we deal with in philanthropy, with youth-serving agencies and religiosity and all sorts of things, all the other nonprofit NGOs that are out there, but it implies land management. We have stewardship and restoration and infrastructure needs that we use volunteers to help with. We do the community-based cleanups and community projects in just getting more involved locally with the things that our land can do for them, and then we have the organizational partners and the informal and the drop-in and the formal. There's a whole mix of things that are going on here. Many times we use volunteers differently than the other sectors because of the way we construe the time that we need volunteers, the skills that we need, the organizational and contractual issues. Many times volunteers in other agencies are just fundraisers, as they are many times in California state parks. We go well far, far beyond that, and I think the work that you've seen in the last two presentations and mostly in the next presentation keeps reiterating that complexity. Next slide, thanks.

Moving right quickly. I just want to make sure you guys don't go to sleep here afterwards.

All Forest Service volunteer managers was the second focus that I worked on, and in fact, it's much like Dr. Macnic's work because we came from the same place. That is that we often looked at the UPS report and in fact Hagar and Bredney are the two fellows that – Dr. Hagar and Dr. Bredney did that UPS

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report, and I partnered with Dr. Bredney, who might actually be on the line now. I'm not sure. If so, hi Jeff, and we're continuing to work together, but the volunteer management capacity work that he did was to go out to the Forest Service managers and ask what do they do differently than the other types of management, volunteer managers that we knew about in other sectors. Next slide. We'll get into that quickly.

This research was done, and there are a couple papers that came out of his one that's in a draft form that's available to anybody in the Forest Service, and another one that's a published report, a cut-down report. It's in the Northeastern Recreation Research Symposium proceedings from last week, so those will be on the website. The key VMC concepts with things like job descriptions, time allocations, budgeting, coordination, training, and we tried to incorporate those into a survey of Forest Service managers and distinguish in our work between those who manage volunteers directly and those who are doing it indirectly, associations and other agencies. We tried to look for some differences both in the authority that we have to do the things and the best practices and what not that we saw from the other sectors, and that's in the report, lots of bar charts and what not that would just be boring as heck to put on the slide right now. So that's available, and we had – as Lisa said in her report – very much the same kind of results perhaps cuz we were two years apart. Ours was done in '06 and hers was done in '08. The duties were recognized 87% of the time but 33% don't even have a duty statement that has anything to do with volunteers, and yet

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they're managing volunteers. 10% had some training at the outset when they were given the job of volunteer management, but even after a few years on the job they had reached two or three years on the top, it's still at the 70% no training position. 15% of the job time is allocated to volunteerism, for people who are volunteer managers obviously, and that's not totally inconsistent with what goes on in other parts of the world by the way. Many, many volunteer managers are part-time assignments, along with other duties. That's not inconsistent, but 15% is still a fairly small percentage of time to expect a lot of focused attention on training and other issues, and 25% of them said that they had some sort of a budget for volunteer management, 22% had some sort of a budget for partnership. Again, it tells us where we have opportunities to improve. Next slide.

I came out of this second phase of research trying to look at the way in which the agency goals were being served and how we were going to work to apply volunteer management capacity, and the report says, if you look at it it comes back with a lot of bar graphs and little bits and pieces of individual questions, but in summarizing it, we can say that the concepts that are being used nation wide for volunteer management capacity can be utilized to direct our own agency outcomes to improve our own bottom line in terms of our research management outputs through volunteers. Second of all, the concepts that are being used for volunteer management capacity could be re-jigged or changed, turned around a little bit and put into our own situation and help us sustain agency community

partnerships, cuz we have that sort of a three-legged stool of ourselves and the partners and the volunteers of individuals to deal with, and particularly as we work forward, there's gonna be many times when working with an NGO or community-based organization is going to give us a sure route to a win-win situation than trying to do it ourselves. Finally, the concept also helps us understand how volunteers achieve more from their service. There's always gonna be turn in volunteers, and this came up in the questions before, and I think it comes up now as well that individual motives change, people's lifestyle changes, things happen in their lives. They have certain expectations about their volunteer service, and we know for a fact that even 20% or 30% or even 40% turn in a given year. In other words, we lose that many and we have to replace them constantly. It's very typical in volunteer programs. You get long-term volunteers, and once you get them for three to five years, and this is in the California state parks stuff. Once you get them for three to five years they stay and you do get long-term commitments, but many times we're doing one-timers, special event days, or you're doing short-termers, they'll help you for a few months, maybe a year or so, and then they drop off. That's part of the landscape that we have to manage, if you will.

So the third phase that we're working on now is probably the more exciting phase because now I'm going back and saying alright, we understand something about the volunteer management capacity, we understand the issues that agencies and communities face in dealing with managing volunteers. Now how are we going

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to understand what the visitors want and where this recruitment and retention and turn rates and all the other things come down? So what we've done is to try to build on that earlier work on volunteerism, incorporate some of the volunteer management capacities and develop a survey. This is – some of you out there probably have seen this survey that's on the bottom there. That was the original survey. We've got a new survey coming out now that is going to be available to all managers in the US Forest Service to use. In fact, on any land management agency, we developed broadly on the notion of resource management so that we can develop the baseline understanding of what's going on with our volunteers, and we want to do that in a customized way. The first bullet says customize because we realize that it is quite different out there. There's a lot of texture differences from one district or one setting to another, and we have a fairly large set of questions and we can ask some of them, all of them, add a few different questions as needed. The questionnaires in the US Forest Service must go through OMB approval. We're in the process of doing that. As of January 9 it will be one year trying to get that approval. Not that I'm there, but it does take a long time and it's very involved, and we'll have approval to get surveys in the field for any of the folks that want them, so we're more than happy to work with individuals. We're trying to focus on management effects and all that, but we've developed a consistent kind of a boilerplate report that will give us some consistency from one place to another, field ready, getting ready to go. It's E-mail based, about 20 minutes long, and we're looking for partners, so we got something that we will be more than happy to discuss with you as we go forward.

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It does, just for the bottom line, it has admin and organizational actions, it has benefits, advantages, constraints, barriers, and sort of direct and indirect volunteering questions involved.

So that's where we are in the three phases over the last 10 years. We have now put together a survey that helps become a capstone, and if we can repeat it and other people can use it, we will begin to build a detailed and repeatable kind of baseline to set that we can use to track changes, to understand our volunteer systems better. The end result of all of this work has been for me to step back as I like things theoretical and I like all the numbers and all that stuff, but sometimes you have to pull back and sort of take a larger view and say what is that the broad scope of this, the research that we're trying to do really looks a lot at the challenges and benefits that occur to each of the parts of that triangle. In summary, I want to emphasize that I sort of came to this research program on volunteers based upon two major conclusions and premises. The first is that although volunteering shares many aspects with other sectors, I think that the environmental giving is different from other types of volunteering in pretty substantial ways. The second is managing an environmental volunteer program is quite variable across the diverse settings of land management agencies. Every unit has its own particular objectives, its needs, its resources, community relationships, and even local cultures within which they have to operate. All this needs to be taken into account in developing and managing a volunteer program. On the one hand, you want national consistency across all these units, and we

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hope that by doing these surveys we'll give you a kind of baseline data that can be compared across units and what not, but coming down from the 30,000-foot level, you realize you have to have this strong individual fit. Our research program seeks to elucidate these principles in kind of a mass customization by assuring that we pay attention in both what the specific or individual units have but also the larger land management issues that occur in the agencies in general. So this graphic reminds us success is dependent upon those three areas. We want to pay attention to the benefits and opportunities of local individuals and organizations. We want to also look at the challenges and barriers that they feel we present in getting involved with us, with the Forest Service, or with any land management agency. Second, the agency has to share its challenges. It has its share of challenges such as fiscal, contractual, safety issues and all that we've heard about, but we also have substantial benefits to use. We have our own social capital and we have our own symbolic equity. I mean Smokey and things like that are things that we can use to induce more volunteerism in our land management activities. Finally, we have this community focus. We serve many communities, a multiplicity of communities, and they're very different from one place in the country to the other and at different levels of organization, so the specific benefits and challenges need to be recognized and incorporated into decisions, and our part of that localized setting. Local values and preferences are at times a godsend, but at other times they're a bit of a challenge cuz they'll kind of go out and do what they want sometimes. It's not enough to rely on the social motivations that pervade in all these other

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philanthropic sectors. We have to understand what we are as land management agencies and we as volunteers specifically and have the substantial focus on doing environmental good. I mean that's part of what we do. Timely information is needed on all these aspects and will drive an effective and efficient volunteer program. It's our hope by doing research on these issues and developing survey tools for managers that we will provide an important element in this process. Hopefully I was well ahead of time and we have time for questions.

Yes, Jim, we do. That last sentence, who wrote that?

Blame me.

Very good. Well thanks Jim. That's a great presentation. This is really important foundational work. There are a number of questions that have come in, and we will take some time to answer them. Let me start out with one though for those on the call who might not be in the know, just what is WUI?

Well, those in the fire community know real well. That's the Wildland Urban Interface.

Alright.

All those _____ that we always worried about.

You know, there's a couple of questions that have come in, but before we get to them I just want to kind of set the stage in terms of scale, and it may not be evident to people who are in an isolated unit, but you mentioned that in the total picture of volunteerism nationally that the Forest Services contribution to that was very small, but I recall from our preparation call for the webinar I think you had said that it's a total of 72,000 individual volunteers contributing 3 million hours in aggregate. Is that right?

I believe those are statistics someone else gave. They're not my statistics, but that's probably in the neighborhood, and if that's the case, put that against the 61 millions of hours that others put out and you realize that we're a small percentage. Environmental giving is about 5% of all giving, and that includes a lot of animal welfare and other kinds of issues that are thrown into that catch-all category. It's always a small slice of the pie when you look at philanthropy in general.

This is Jim Bedwell. I have our 2009 numbers that I'll be talking about at the end.

Very good.

Great.

They're bigger than that.

That's impressive. Wow. Truly is. That has a gravitas to it that is substantial; 80% now manage volunteers but don't even have a duty statement reflecting that.

We asked people – yeah – if it was part of an official duty statement, and we got a couple of different levels, and I gotta go back to my numbers here of information on that, but substantial numbers of people don't have a recognized – they just do it out of the kindness of their heart. They take on these jobs because they really care about working with youth organizations or working with the community, volunteer, or working with trail days, or whatever it is rather than having them formally recognized within the structure of their job.

Well let me go to a couple of questions that have come in, and some of them relate to your study and the previous things that have come in. When you use the term volunteers, you're also referring to youth and hosted programs and participants?

Well yes and no. I mean we leave it rather open when we – a lot of times we give a description at the beginning of what volunteers are or aren't, when we do our survey. The survey that – the numbers that I have from surveys right here are either from outside the Forest Service with the California state parks or from

managers of volunteers, but I don't have any actual information from Forest Service volunteers themselves, and actually, very, very few people do. I'm not sure that – there has never been a nation-wide study of Forest Service volunteers per say.

This is Jim Bedwell again, and for the purpose of this entire webinar, when we say volunteers we are talking about straight volunteers and volunteer organizations. We're talking about youth organizations that we have partnerships and our hosted programs, which have an employment aspect, things like Ameracorps, Student Conservation Association.

Okay.

Youth conservation corps. We're using some shorthand. All these numbers and findings may not apply to all of those, but for the purpose of this webinar we are talking about all of them.

Well even if it's one hundredth of a percent, nation wide, how does that – do you know how it compares to other land management agencies, federal land management agencies?

I know a little bit. Parks Service and BLM do a pretty good job of posting some of their numbers, and I think we're consistent with what they're doing in our work.

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obviously the Parks Service numbers are somewhat higher because the visitor services function that they champion more directly with their visitor centers and everything else, and they often have friends groups and what not for every part and unit where we don't, but other than that I'd say we're not totally out on the end of the spectrum, if you will, on the low end of the spectrum. We're in the mix.