Digital Care Circles: The Future in Volunteering?

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Part One of a Three-Part Series

It was 1997 and I had just spent all the money I had to get to my first *Points of Light* conference in New York City.

I was young.

I was from Utah.

NYC is huge.

You get the picture.

As I wandered into the hotel lobby this spritely, dark-haired woman saw my predicament, grabbed my elbow and said: *"You look lost, let me help!"*

That was my first encounter with the incomparable Susan J. Ellis. Though she passed from us in 2019, I can still see her in that lobby—and on the many bookshelves of our profession— guiding us all.

We face a much bigger space today. Stark challenges both hound and inspire us. The call-to-action has never been louder. So, when I last saw Susan at the MAVA conference in 2017, a number of us promised her and one another that we'd *"do something."* Since then, Dana

Litwin, Joan Cardellino, Craig Young, Jerome Tennille, myself (Todd McMullin) and kept our promise to Susan. We have met in "lobbies" and we have been quietly researching new ideas and approaches to Volunteer Engagement.

This article, the first in a three-part series, is an introduction to what we've learned. Some of our conclusions come from cutting-edge research we've conducted over the past two years as well as from models we'll reference throughout this series. Other conclusions reflect time-honored concepts that Susan taught us.

Before continuing, I want to also thank VSys One for funding our research in Volunteer Engagement software solutions. The technology described in this series doesn't yet exist but we appreciate the willingness of VSys One to help define the future. We've also gained inspiration from think tanks at Stanford University, University of Oxford and Harvard University who study today's 'digital society' and from social equality programs like the Equitable Evaluation Initiative.

Care Circles (Beyond Peer-2-Peer)

Peer-to-Peer engagement (P2P) has been a buzzword for years and there are many software solutions that facilitate socialized donation of both time and money. These solutions fit on a spectrum, with functionality ranging from basic social networking to educating volunteers on how to better engage with their passions. We believe, however, that the future consists of going one critical further step: ***helping volunteers to create and manage their own "care circles" of peers around the people, causes, topics and communities they care about***.

Yes, they become their own Volunteer Managers and no, this doesn't end our profession! (keep reading).

What are digital care circles?

By definition, "care circles" are free-flowing, open social constructs that can be put together (and disbanded) rapidly by one or two individuals known as "conveners." They are formed around a person, cause, community, task or event with the objective of achieving a communally-derived definition for success. We'll discuss more about this later.

Some examples: A care circle might be convened by you for your parents who live far away and need help with day-to-day tasks. It might be convened by a schoolteacher who wants to recruit volunteers to help a kid with reading. It might be *you*, standing on the corner talking to a person experiencing homelessness who expresses legitimate needs for shelter and food that

you can't meet on your own.

What we envision is a future where the convener presses a button on their phone that sends out a considered call for help to anyone who shares or may share a similar desire to serve the kind of people, cause, community or topic the convener has identified. Next, the same technology facilitates the introductions, interactions, permissions and logistics (aka 'management tasks') needed to coordinate that service. Then it facilitates measurements of success by gathering data and reporting on progress. Finally, it helps the digital care circle engage with the professional and financial resources needed to serve effectively while integrating these into all the above.

This digital care circle concept takes P2P to the next level by empowering every individual with the tools they need to discover and manage one another dynamically.

Beyond P2P in more ways than one

But there's another distinct difference between traditional P2P and what we envision. Most P2P solutions we've seen are still grounded in the idea that person (or institution) "A" recruits persons "B-E" to go do thing "X." That kind of thinking, which is almost militaristic, has become ineffective when addressing the kinds of challenges our world faces. The result? We're floundering.

This "A > X" mentality only works when there are sufficient numbers of people ("A") connected to institutions, and when "X" can be quantified properly by institutions. While it's no wonder that our post-war society structured work this way, it's proving ineffective as we face the increasingly complex needs of individuals, communities and our society. Further, this vertical leadership model can lead to social inequalities by constantly presuming that "A" has more resources (time, money, skill, insight, wisdom) than the multitudes of other people who are nearer to the problem and might be better able to address it.

Let's take the kid-struggling-to-read example and look at it from a different perspective: Do we recruit well-intentioned adults for program "A" to come into the classroom and read with the kid for a few minutes each week? Or, do we convene a circle of people (including people the child already knows) to join in a coordinated effort to improve reading skills? What if the child's parents, grandmother, neighbor, soccer coach and clergy all interacted digitally with one another to address the problem? Whether the child goes to soccer practice, the neighbor's home or worship services, they get praise for progress, offers to help, suggestions on improvement and random amounts of reading practice that is monitored by multiple people who care, including the teacher. The problem is then solved emotionally *and* tactically by the

people this child already trusts and interacts with, all while reinforcing permanent relationships and adding new ones. *(Please note: The "convener" in this situation should be someone who has known the child a long time, not the teacher).*

Sometimes someone in the child's circle fails (or has already). Or, maybe there just aren't enough people in the circle to achieve success. That's OK! We *expect* this.

Because everyone is equally sharing the burden and because the circle receives constant infusions of talent from the broader community, others *naturally* step in to fill voids because they've *chosen* to be invested in this activity, person or cause. Further, coordinating with one another electronically to achieve success is convenient, dynamic and even fun, creating further incentives and organic growth.

Measuring success within the digital care circle

"Success" itself is also defined and measured by and within the circle, collaboratively with professionals where appropriate. In many cases, the original convener will be involved with their circle until success is achieved. In other cases, they are just the spark that ignites successful efforts. In a properly constructed care circle, it absolutely does not matter who is "leading" or who does what activity. In fact, the idea of vertical leadership is exactly what we're trying to deconstruct here. Any circle member can step forward to pursue any portion of the success definition at any time, or recruit others into the circle when things falter.

In the new world, we envision that every human being is equally capable of serving, succeeding, caring, connecting and then empowering others to do the same. If you think about it, this organic approach to success is what has already been progressing humanity through challenges for generations and care circles are just a more modern label for family and communal care. Digital care circles are really just a return to–and reinforcement of– *classic* service models that will now be reinforced, facilitated and expanded through modern technology. Therefore, success is rooted in *who we are* as a people, not what we may be persuaded to do. It's capturing the *source* of the volunteerism spirit, not trying to mold that spirit around someone else's service model.

While our first example involved a child needing help with reading, the same concept works in most other environments, including healthcare, homelessness, community services, food insecurity and more. In each case, a passionate person forms a dynamic care circle around one or more other people and engages *with* them in achieving successes they've defined together. The circle members work together as equals without any reliance on external management but with open minds to the viewpoints of other circle members and qualified

professionals who understand the problem they are addressing. Nobody, not even the professionals, outrank anyone else. Rank no longer exists. Circles are about effectively engaging, empowering and enhancing existing passions with equanimity.

We have to hand it to the healthcare industry for recognizing the value of care circles. Clinicians know that recovery requires educating and engaging a support circle around their patient and they even leave critical care decisions up to the patient and family. They advise, certainly, but rarely "decide." In spite of this, we still spend vast amounts of money building Volunteer_ing_ Departments inside hospitals using the "A > X" mentality without harnessing the Volunteer_ism_ Circles that already support the patient. We haven't figured out how to coordinate formal with informal volunteers well... yet.

Our Jobs Will Change, Not Disappear

The future Volunteer_ism_ professional will be both a member of many circles and a convener for a few specialized ones, depending on circumstances.

Let's consider an example in healthcare: there's a homebound widow named Janice. One day a care circle member named Jeff shows up to walk the dog but notices Janice is exhibiting severe exhaustion. Jeff alerts the other team members, including Janice's daughter, using the care circle app. The decision is made to get help and Jeff pushes a "Big Red Button" that transfers current location and vitals to the emergency services. The app also alerts the hospital about the pending admission. Once Janice is resting comfortably in her hospital room, the system will send a link to her and the members of her circle, advertising services available from volunteers during her stay (and potentially afterwards through home healthcare). If anyone is interested, then the app will invite Vicki, the hospital's Volunteer Manager, into Janice's circle so she can coordinate volunteer services, much like hospital case workers do today with other services. Volunteer Managers will become more like "Volunteer Care Coordinators" who work more closely with other members of the person's care team in order to improve health and prevent future challenges. By working through care circles, Care Coordinators become much more valued and valuable.

The volunteer managers of the future in most organizations will also assure the Social Determinants of Health (SDOH) are functional in Janice's life and will _suggest_ resources if they are not. Representatives from supportive programs can then join Janice's circle. All of this will be a natural and integral part of Janice's after-care plan. This near panacea of care is only possible because large infusions of labor are made available and then self-coordinated by care circle members reinforced by Care Coordinators like yourself. Circle members who had no idea that community organizations existed may become so inspired by the organic, convenient, micro-giving that they register to become permanent volunteers and donors,

therefore reinforcing both volunteerism and fundraising efforts. This "non-model" therefore merges and reinforces both formal and informal programs while—at the same time—improving service and reducing costs.

Current Technology Assessment

Current P2P or Volunteer Management Systems (VMS) are the closest we have to a care circle app, but they still reinforce "A > X" thinking. Conversely, social platforms allow anyone to interact on anything but without client management, success measuring, or even tactical functions like scheduling. Various attempts have been made to merge social media with P2P, but so far these only allow peers to chat with one another or maybe join a themed discussion or group. While we applaud the more volunteer-centric thinking, we also recognize that most people simply don't know the specific needs of the individuals, causes or communities they feel passionate about serving. This leads to service projects being generic and reactive rather than individualized and focused.

As mentioned previously, care circles must have a *specific* person, community, cause, topic or goal on which to focus, measure and report. Therefore, any new technology must reinforce personalized, socialized, focused giving. Current solutions and models aren't generating sufficient resources to address the challenges we face because they haven't truly embraced modern trends such as crowdsourcing and Ecommerce. Therefore, the technology we envision begins by asking people who or what they are passionate about and then 'stores' that 'potential' in a database until others come along who need it. This will help conveners build their circles and reinforce them with the resources, success definitions, professional advice, measurement tools, funding, knowledge, training and other elements needed for the circle to succeed. For the most part, these resources will be owned by individuals, not institutions or government agencies. It's the ultimate grassroots empowerment tool and the volunteerism parallel for—and integration with—crowdfunding and crowdsourcing apps.

The National Platform Is a Beginning

For years now, many of us have spoken about the need for a National Giving Platform that can harness all the passions and skills of countless people and make these equally available to everyone—regardless of affiliations with organizations, portals, VMSs or funding sources. The platform would be owned and governed solely by and for the Volunteer Engagement profession. This article doesn't have the space for more detail but you can download this slidedeck for more information. The next article in this *Engage* series, scheduled for publication in July 2023, will also expand on it.

Regardless, just having a new platform <u>won't be enough</u>. Any new technology must also embrace a more modern concept of engagement in order to generate the resources required for current and future needs. After all, there is also only so much growth that can be gained by tweaking interfaces, partnerships, models and funding sources, and we're rapidly reaching the end of those ropes. The new technology must embrace the same trends that are already revolutionizing the world. Crowdfunding and Ecommerce are here to stay, and similar functions must be available in the new platform even though the proceeds will go to the charitable work being done through care circles rather than shareholders. In both cases, these trends reinforce 'socialized individualism,' with decisions made more from informed, collectively-considered opinions than messaging from traditional sources. Bottom line, the new technology must empower *anyone* and *everyone* who wants to contribute *anything* for *any* reason to *any* person or purpose while also convening people into circles that make it all happen. And isn't this democracy at its best?

Stay Tuned!

Additional articles in this series, to be published in future *Engage* issues, will expand on socialized outcome measuring, the science behind modern trends, meta-governance, the national platform concept, and *how* to do all of this harnessing, focusing, measuring and managing collectively and collaboratively. We'll also do a deeper dive into ways we can all work together to bring these new ideas to fruition and suggest some pathways forward for YOU to consider as you transition your programs to a new way of thinking.

In the interim, we hope you'll think about digital care circles, comment and do your own research. If you're ready to learn more right now, we recommend reading the "Philanthropy and Digital Society Blueprints" published by the Stanford University Center for Philanthropy and Civil Society (PACS). Their blueprints for <u>2020</u> and <u>2021</u> define our current digital landscape and gave us many of the ideas we discuss in this series.

Thank you, Susan.

Joan Cardellino
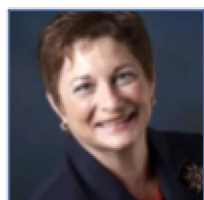
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