

White Paper: How to Run a Successful Postdoctoral Organization

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Summary: Postdoctoral scholars form associations to gain organizing power and an institutional voice. These associations form on the fly and learn by trial and error, reducing their efficacy. This White Paper aims to help postdoctoral scholars govern so they become more effective at improving the postdoctoral experience. The first part outlines the importance of structure in volunteer associations and how to achieve it. The second part covers how to maintain good relationships both within the association and with others. The final part deals with advocacy and effecting change. The research and stories from postdoctoral associations presented in the paper will help you gain understanding of organizational structure as it applies to postdoc organizations, appreciation for methods of gathering support throughout University administration, and insights into challenges to new policy and how to meet them, so you are better prepared to represent the postdoctoral scholars at your institution.

Introduction

You are in charge of a group of volunteers looking to improve postdoctoral training and effect policy change for your larger community. Where do you start? How do you recruit and retain active volunteers? How do you unite people behind one voice? How do you tackle issues that will reach their conclusion after you have left?

These questions torment the leaders of every volunteer organization. The guidelines outlined in this White Paper are based on scientific research and experiences from people leading postdoctoral associations across the US. They are meant as advice to help you run your organization more effectively.

The key to running a volunteer organization is the people. Your work will depend on the concerted efforts of other volunteers, many of whom you will need to motivate to achieve the changes you envision. This paper discusses different aspects of working with volunteers. The first section outlines how a strong organizational structure helps you recruit volunteers to your cause and retain them, by providing support, expectation, and credibility. The second section discusses how you can build and nurture relationships within your organization to scale the success of the organization and increase the scope of your influence. Once you have built a solid structure and good relationships you are ready to effect meaningful change. The third section helps you tackle an advocacy agenda.

Each section follows a similar outline that focuses on people. You will first learn to look for their values and how they relate to yours. Then, you learn about strategic decisions that can bridge these values. Finally, you will read stories that underline how connecting values brings you closer to your goal.

Structure: How to recruit and retain active volunteers

Volunteers are the central element to your organization. In order to achieve your goals you will need to recruit and retain productive volunteers. Sounds simple, but how do you do that?

Volunteer values

Ask yourself, why did you step up to this job? You did so because you find value in it. To enable others to do the same you need to help them find value by identifying what prospective volunteers look for. Volunteering is an emotional and value-based activity¹ and often secondary to time-consuming obligations like full-time jobs and family responsibilities. Understanding the values of your volunteers will thus help you recruit and retain them. Surveys among volunteers show that the reasons to volunteer are diverse. A frequent reason is the wish to make the world a better place². Others look for recognition, have a vested interest, or value training and professional development. These values correlate with volunteer retention³. Therefore, when your volunteers find what they value, they are more likely to stay with the organization and help you achieve your goals. The different values translate into two different behaviors. Some people know exactly what they want to do. They have a specific aim in mind that your organization can help them achieve. Others are less clear about what they want. They like what you stand for and want to help without a particular goal in mind. As a leader you are expected to consider what prospective volunteers want⁴ and then help them achieve it.

Your brand communicates your values

The first step towards meeting volunteer values is to clearly articulate your values and those of your organization. Great companies are valued for their culture and mission. People are attracted to these companies not because of the work they would do, but how their work will matter. Volunteering is no different. The most important organizational feature attracting volunteers is the organization's aim⁴. You can create a clear mission statement to define achievable aims, which will attract people with interest in making that happen. You have the power to shape organizational values in a brand that attracts volunteers.

Story: Market your brand. The Stanford University Postdoctoral Association started with the acronym SUPD. While funny for its association with the Stanford University Police Department, it bred confusion and distracted from the serious goals. The council wanted a new name and adopted the acronym SURPAS. It resembles a word with positive meaning and ties in with the mission. Now all at Stanford know that SURPAS helps postdocs surpass themselves. Designers helped to design a clear and impactful organizational logo.

Respect

Once you have attracted volunteers you will need to connect with their values. They will want to know how they can help, and you need a process to put them to work. Here the important word is respect. Anticipation of respect enhances attraction to the organization⁷, and just like you want to be respected for your commitment and time, so do your volunteers. You can give your volunteers the respect they deserve by stimulating participation and transparency, by providing support and mentorship, and by fostering creativity.

Respect through participation in decision-making

Transparent decision-making is an important part of any organization. People need to understand how decisions are made and how they can participate. If volunteers can participate in decision-making they will integrate better within the organization⁸. A tested structure is a council with defined leadership roles. The leadership stimulates active discussion in council meetings by following an agenda. Everyone gets heard before moving to a decision and volunteers have a vote and feel empowered. Volunteer retention correlates with matching volunteers with assignments³, so give them tasks they like⁹. Participation correlates with perception of volunteer treatment¹⁰, so treat your volunteers with respect to encourage their participation. Your credibility improves when you are perceived as working on behalf of the organization rather than the other way around.

Story: Structure your meetings. For a time few people attended meetings of the postdoctoral council. Decisions needed to be made and the leadership felt forced to make them among the attending leadership members. While this ensured that the group moved forward, it did not help participation. In fact, when two leadership members left, only four people remained involved in the decision-making process. The leadership changed course. They gave all decision-making power to the council and began enforcing a quorum. This quorum increased the need for participation, and this need drove the council members to attend. The new course resulted in twelve consecutive meetings at quorum and decisions made by the council as a whole.

Respect through support and creativity

You can set expectations for participation in decision-making by writing supporting bylaws. Bylaws refer to general rules of conduct that outline how your organization functions. Whereas guidelines and structure are generally beneficial, even low levels of bureaucracy can alienate volunteers⁴. The trick is therefore to lay out broad rules that offer support without restricting creativity. Effective bylaws have three elements. 1) Clear roles, without restrictions on creativity. These roles provide meaning, shape the interpretation of events, and influence decisions⁴. Moreover, official representative positions that come with status (representatives on academic committees or task forces) stimulate participation⁸. Know that ambiguity in assigned roles impairs volunteer contributions¹¹. 2) Clear transparent processes for decision making. A transferable body of knowledge enables future teams to learn from successes and mistakes from the past. 3) Clear processes for exceptions. You cannot foresee everything that might happen, and you can imagine a situation where the rules work against you. A process that enables you to deal with such rare instances will improve your credibility. People tend to follow simple rules, which will greatly increase your ability to lead them. When writing them, refer to established bylaws that have been effective for similar organizations. You can find an example of successful bylaws on surpas.org.

Story: Write your code of conduct. Sandra wanted to help out and volunteered for a committee. The person in charge wanted to help her as much as possible and outlined everything that needed doing and how to do it, from getting tables and power at events to recruiting other volunteers. When Sandra saw this list she realized it was a lot more work than she could possibly do. She declined the position, offering that someone with more time and experience would do a better job. This is unfortunate because Sandra was eager and smart. She would have been able to solve the problems on her path. Rather than spell out every detail, give people like Sandra the space to make the assignment their own.

Respect through advisory structures and honorary positions

Your volunteers will be smart, invested and equipped to solve problems, though they can always use advice. You can imagine situations so specific that they are hard to solve. Advisory bodies can help you navigate such situations. Writing them into the bylaws lends them credibility, while their expertise will give useful perspective. These positions can be filled by people with specific knowledge. Moreover, leadership alumni may be happy to help you out. Honorary positions give them credibility and a reward for past service, effectively guaranteeing their feedback and mentorship.

Story: Transfer your knowledge. The newly elected leadership faced the daunting tasks of learning the structure of University administration, making connections, and setting a foundation for change. Luckily, the previous leaders started transferring knowledge to the new leadership several months before the changeover to maintain continuity and momentum for ongoing initiatives. They made introductions to University administrators, created a Dropbox with past documents, and provided advice throughout the transition. After the start of the new council term, the previous leaders were extended “special advisor” positions to both acknowledge the former leadership for their hard work, and encourage their continued connection with the leadership in an advisory role. As a result, the new team could immediately focus on their goals of improving the postdoctoral experience.

Relate: How to involve your people

Now that you have a clear structure and have attracted volunteers, you will need to maintain the relationships with them. Just offering what they seek is not enough. You will need to help them achieve it, and thereby help them achieve your goals.

Values involved

The postdoctoral scholars you work with and represent spend long hours working on their research¹². Deadlines haunt them and conferences, field work, and vacation result in periods of absence. Your success as a leader depends on your ability to accommodate their heavy and changing schedules. The key value here is trust. You need to trust your volunteers and they need to trust you. First, people may be hesitant to take on responsibilities due to time constraints. Trust the intentions of hesitant volunteers by asking them to help first, and lead later once comfortable. Committees enable volunteer redundancy where people can take over for each other in times of stress. It is a great comfort knowing and trusting that someone has your back. Second, volunteers may feel uncomfortable in leading positions. Putting decision-making power in the hands of groups helps overcome this. Foster trust in relationships with good communication, accountability, conflict resolution and mentorship.

Trust through communication

Good communication is essential for any viable organization. It helps you coordinate relationships among volunteers and helps them make sense of all that happens¹³. With good communication you can build expectations, broker consensus, and sell the outcome to the community. With good communication, you can help your volunteers navigate through their busy schedules. Submit documents ahead of meetings so people can read on their own and arrive prepared. Talk to people in person when you want to make sure a decision is made. You will gain valuable direct feedback and your volunteers will feel heard. Make sure all volunteers involved in a particular project actively support outgoing group communications. This consensus will slow you down but your team will last longer so you can tackle bigger goals. Finally, as a leader your job is to monitor and communicate progress. You can thank people personally and publicly in meetings, open emails, or by official award certificates. You can similarly motivate university administrators by recognizing exemplary behavior with awards. You are advised to pay attention to past achievements. The things you fight for, once achieved, rapidly become the new normal. Improve your image by communicating past achievements in addition to current goals. You can do this on your website and local newsletter, in interviews with on-campus media, and in written opinions in online periodicals such as the newsletter of the National Postdoctoral Association.

Trust through delegation and accountability

Big aims require effective delegating among many hands. By delegating tasks you enable volunteers to step up and feel useful. It comes at a risk, because you cannot be sure they will deliver quality in time. Just like you want your volunteers to trust you that you will lead them in the right direction, your volunteers also want you to trust them. Often, you will feel the pressure of a job not done by a volunteer. Resist the urge to accomplish it yourself. Instead, give them ownership and hold them accountable. Research shows that accountability is important in scaling organizations¹⁴. You can do so in three ways. First, public recognition correlates with recruitment and retention¹⁵. When volunteers get recognized for doing a particular job it validates their efforts. Friends will ask after their progress and this social accountability stimulates action. You can require outgoing communications to be vetted and signed by all participating volunteers so that everyone sees who are involved. Second, you can encourage volunteers to manage and recruit other volunteers¹⁶. One-on-one recruiting positively correlates with volunteer retention³ and the personal interactions ensure that attitudes lean toward the organization's mission⁵. When people interact, they inquire after each other and thus hold each other accountable. Third, you can monitor progress at meetings. The best leaders ask questions, so be sure to ask many. When you hold people accountable, they will deliver or you will have good reason to let them go. This

sends a strong message to other volunteers: you are all in this together. When you delegate, think about who gets which task. You will limit the risk of non-achievers by selecting dependable people for the essential tasks.

Story: Delegate your tasks. Leadership members are often the most active volunteers. Their activities set the scope of the whole group. One large association wanted to increase in scope. They began giving tasks to council members and outsiders. They gave ownership and built accountability by asking groups to collaborate. Thus the association could scale to more than 20 committees with more than 50 active volunteers. With this new visibility and credibility they could actively contribute on multiple fronts.

Trust through conflict resolution

Conflicts happen whenever people work together. These conflicts are often trivial and disappear on their own. However, they can grow to paralyze volunteer efforts¹¹ and derail your organization. Therefore you should work to limit conflict. Good communication between and within teams reduces the chance of conflicts. It correlates with commitment and low burnout⁴ and reduces ambiguities to keep everyone on the same page. Your leadership is also important. A participative leadership style is the least conflict generating¹⁷. You will reduce the chance of conflict by enhancing participation. It gives volunteers the chance to speak their minds and argue with you. This releases tension. Finally, you can embed a process for escalated conflicts. An advisory board with impartial members who understand your organization can offer impartial perspectives and help you deal with large conflicts so you can focus on the organization's goals.

Story: Set the right example. An informal survey among postdoctoral associations revealed that most host symposiums. More surprising was that leadership members often win awards at those symposiums. This may reflect good communication skills, but something else is happening too. Leadership members are visible and well-liked and therefore judged more favorably. This is called a conflict of interest. The interest of the group (the best wins) conflicts with the interest of the individual (the individual wins). You become more credible when you can avoid such situations. Where possible, ask if group interests align with personal interests. Competing at events you host is never a good idea.

Trust through mentorship

Advice helps your volunteers learn and move in the right direction. Teaching and leadership role models have positive effects on grassroots leadership¹⁸. Many people are involved with your organization for career development. You can work to offer leadership training to help their career development and increase their efficiency, which, in turn, will benefit you. When funds are limited you can invite experts, alumni or past leadership to give back to the organization and offer their perspectives. Finally, just as your volunteers need mentorship, so will you. Ask advice where you can, and especially before you take action. Mentor your successors so they can take over without skipping a beat.

Story: Listen. Postdoctoral Associations foster networks among members by hosting social events. It can be hard to find volunteers to help organize, let alone take the lead. When one association installed a Social Committee, the leadership first tried to assign responsibility by designating a committee Chair. Unfortunately, nothing happened, because the designated Chair lacked the time and interest in leading. The leadership quickly changed strategy and switched to listening. In personal conversations, they asked council members what they wanted to do. In council meetings, they asked which events were needed and why. The resulting input from council members showed who was interested. Moreover, the discussions offered council members the time to adjust to the idea of leading. While some ideas were never realized, many of such discussions resulted in someone publicly committing to lead, because they cared to. Now, only committed leaders step up.

Advocate: how to effect meaningful change

Samuel¹⁹ defines public advocacy as a set of deliberate actions designed to influence public policies or public attitudes in order to empower the marginalized. In short, you will need to become influential to effect improvement for the marginalized group you represent. How can you be influential?

Values

There is power in numbers and uniting many voices will enable you to effect meaningful change. This requires that you convince others to set aside personal goals for a greater communal goal. This will in turn depend on your leadership and ability to persuade people to accept your course as wise. The key value here is knowledge. Engaging in advocacy requires skills for brokering consensus²⁰ often by reciprocal exchange of knowledge. Knowledge is a source of power when negotiating interests in advocacy¹⁹, so you will need to be knowledgeable. First, you are dealing with administrators and faculty. Know their agendas and goals. These people could be on your side, so communicate with them to gain their respect and trust. Second, your community has needs. Know what they are. You will be able to advocate much better with the aid of sound knowledge and with the respect and trust of the community. Third, people around you need to know what is happening and why. Inform them. You will need to communicate your decisions and goals to the whole community you represent. Their buy-in is essential to your success. Negotiated agreements have stranded because the leadership failed to get the support of the whole group²¹. You can increase knowledge through surveys and open conversations.

Know your community

First, get information on the needs of your volunteers and community and establish key priorities. You can do this with a survey. A good survey provides information on your population and should be representative of the total population. It helps to put things in perspective. Survey response rates average 30%²² and have declined in recent years. At this rate, surveys can provide valuable data²³, provided you know that the responses are representative. You can stratify the survey to increase the likelihood of a representative survey. In addition, you can take steps to enhance response rates. Time is a constraining factor and you can help survey takers by offering a short survey that has demographics questions at the end. Offer simple choices that require little time to consider. Either ask people to choose between limited options or ask their opinion on a clear statement. When you can, ask help from a professional statistician. This improves the quality and credibility of your survey. People appreciate being valued for their time. You can stimulate this feeling and enhance response rates by offering a raffle among participants. Finally, communication is everything. You probably have an inbox overflowing with emails you cannot possibly read completely. So will the people who are to take the survey. To overcome this barrier, you will need to write a succinct clear announcement that will grab attention. Announce the survey launch date well in advance. The anticipation will trigger conversations and increase general awareness. Depending on the nature of the survey, consider also running a draft by the administration. They are one of your ultimate audiences and their input up front on the design and or phrasing can both improve the survey and result in its results being received with more credibility and impact.

Story: Establish the problem. When the leadership members started lobbying for transportation benefits, the idea met with resistance among postdocs who did not need these benefits and among faculty. Rather than fighting it, they asked for meetings with the opposing people. They learned that certain faculty had been working on and mustering support for other initiatives on behalf of postdoctoral scholars. The claims that these changes were necessary would lose power if the beneficiaries themselves would argue for something else. In a series of meetings they were able to integrate goals and turned a potentially embarrassing situation into an opportunity.

Know your selected problem

Once you have a clear list of needs, you will need to prioritize again in terms of feasibility. At this stage you will need to establish consensus among your volunteers and among the administrators and faculty who will be involved directly or indirectly in deciding on future changes. At universities, you are likely dealing with mostly academics. There is nothing like data to convince an academic. Be informed and let the data speak in support of the changes you are advocating. For example, if you desire housing support; document the cost of living in the

area over time. Find out how peer institutions handle similar problems. What do local companies do? And most importantly, what is the negative effect of doing nothing for the institution? Here, pay close attention to the interests of the faculty and administration, not just the impact on postdocs' personal lives. How is the problem meaningful for them?

Story: Support your claims. SURPAS members often raised the question of transportation benefits. It was well known that many postdocs commute by train and they would obviously welcome transportation benefits. What remained unclear is why these postdocs chose to commute and whether non-commuting postdocs would also benefit. To answer these questions, SURPAS installed a Transportation Committee with the mandate to gather data. This committee gathered rental prices from multiple sources and found that the cost of living drastically increased as one moved closer to campus, reaching 60% of a postdoc's take-home pay. A postdoctoral survey with ~50% response rate revealed that ~20% of the 2,100 postdocs commuted by public transportation. Commuting postdocs pay up to \$2,150 per year for train passes. These data painted a picture of postdocs routinely choosing between high rent near campus and an expensive commute, and this led to predictions on how the whole community would gain from transportation benefits. The rigorous data analysis enabled SURPAS to start a constructive dialogue with the university administration and the postdoctoral community that culminated in a pilot transportation program.

Know the communal support for change

Although you are an elected representative, people may question whether your organization's current goals truly reflect the will of the majority, especially for changes that will affect a minority. In these situations your ability to mobilize people will translate into political power¹⁹. Gather the opinion of many people on a particular matter with a petition and prove wide support for your goals.

Story: Give your people a voice. One main postdoctoral advocacy goal was transportation benefits. Good survey data showed large support among the community, and further studies provided economic arguments in favor. Still it remained unclear whether this would be the best use of university funds. The council hosted a petition and gathered supporting signatures from more than half of the community. This voice could not be ignored by the administration and started a shift in attitudes that resulted in a pilot program. You represent a large group of people. Do they care about your goals? Your ability to mobilize them behind one cause will grant you credibility and a powerful voice.

Know your allies

When advocating for change, you will benefit from people who help remove obstacles¹⁸. Identify allies who can help you overcome resistance and the path to a meaningful decision. The key to finding allies is understanding their interests and motivations. Just like your volunteers, these people have goals that you can help them achieve. Whereas you are a volunteer, these people are paid to do a job. Help them do their job and you will gain a friend who can help you. You can gain knowledge by asking people directly what they want to achieve or what would make their year successful. You can glean additional information from mission statements. Once you have a clear idea of what people need, ask how you can help out. If they want to improve mentorship, help them improve mentorship. Where you can frame your goal as a function of their needs, you might be able to tag along. The prime concern of administrators will be what the majority needs. As a volunteer leader you are ideally equipped to answer this question and thus help administrators move forward. Your allies may also be working on parallel initiatives or goals on behalf of the group you represent. Don't put them in embarrassing situations by offering a contrasting opinion on what your group really needs. You would alienate a friend and lose credibility. Also, your request for change may require reallocation of funds. Make sure that people involved understand your problem. Then, when a reallocation proposal does come their way they will not reject it in surprise but rather consider it rationally.

Know to communicate the problem, not a solution

As a volunteer leader your job is to bring problems of the marginalized to light. Until people agree there is a problem and agree that it is worth solving, nothing will change. Once the administration agrees on the problem, it will be their job to see to its solution. They might install a committee, ask people close to the matter, or ask you. Beware of offering solutions. Offering solutions is usually a good thing, so long as it is done with an open mind about alternatives and not as a "take-it-or-leave-it" offer. There may be political plays going on you are not aware of and by focusing on a particular outcome you may inadvertently discard a solution with broader support and higher chance of success.

Conclusion

You have stepped up to a position of leadership in order to effect meaningful changes. Like many in your position, you face questions on involvement, recruitment and lasting change. The guidelines offered here are to serve as advice to help you run your organization effectively and complement the PDO toolkit by the National Postdoctoral Association.

You learned that everything revolves around people and only by meeting individual needs can you inspire change. You learned how organizational structure can help you with volunteer recruitment and retention. This is especially important when you run a large organization. The size of an organization negatively correlates with recruitment ease²⁴. You learned how to increase scope and influence by fostering good relationships and how to translate those relations into advocacy for change.

All change comes slowly. Alone, you can cover many strides in a short time, you can go fast. Together you can take few steps with great certainty, you can go far. Whenever you present a case for change there is a chance you will hear “No” no matter how good your argument. There simply may not be enough funds, or insufficient people are convinced of the merits. This “No” should not be taken personally. Study the argument, improve your case and try again later. Look for small steps towards a greater goal that will support future generations and leaders.

Please use the summary card below as a quick reference guide to help you govern.
Good luck!

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Run Your Postdoctoral Association With Success	
Structure	<p>Market your brand <i>Show what you stand for to attract the right volunteers</i></p>
	<p>Structure your meetings <i>Prepare meetings with transparent decision-making to stimulate participation</i></p>
	<p>Write your code of conduct <i>Establish clear roles and processes to set expectations</i></p>
	<p>Transfer your knowledge <i>Create advisory structures and alumni positions to gain and offer advice</i></p>
Relate	<p>Delegate your tasks <i>Give ownership of meaningful tasks to empower your volunteers</i></p>
	<p>Set the right example <i>Communicate effectively to limit conflicts and conflicts of interest</i></p>
	<p>Listen <i>Understand the needs of volunteers, allies, and opponents to gain trust</i></p>
Advocate	<p>Establish the problem <i>Agree on a problem worth solving to enable people to think of solutions</i></p>
	<p>Support your claims <i>Inform your argument with rigorous data to gain credibility</i></p>
	<p>Give your people a voice <i>Unify diverse opinions to create power by numbers</i></p>