

Center for Inquiry
Leadership Conference 2011

EFFECTIVE VOLUNTEER MANAGEMENT

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DEVELOPING A VOLUNTEER MANAGEMENT SYSTEM

- ◉ Purpose Statement
- ◉ Policies
- ◉ Recruitment
- ◉ Orientation
- ◉ Training & Development
- ◉ Retention
- ◉ Appreciation
- ◉ Planning for Turnover



WHY DO YOU WANT VOLUNTEERS ?

- ◎ Everyone "needs" volunteers
 - We're all busy: limited time & financial resources
 - Student groups don't have paid staff - so you need all the help you can get
- ◎ Why do you want volunteers involved in your campus group?
 - Gives ownership of group – sense of belonging
 - Spreads out the work-load
 - Helps you and other leaders be semi-objective and have a critical perspective about group and activities
 - Utilize diverse skills, talents and experiences of members
 - Fresh/new perspectives, creative ideas

WHY DO PEOPLE VOLUNTEER ?

- ⦿ Support organization or cause
- ⦿ To get more involved in organization / community
- ⦿ To learn more about an organization
- ⦿ Networking and relationship building
- ⦿ Because it's fun or feels good
- ⦿ Acquire new skills or maintain skills (unemployed)
- ⦿ Fulfill the service requirement of a club or school
- ⦿ Gives them purpose
 - Helps them feel like they are needed and “fit in”

DEVELOPING A VOLUNTEER MANAGEMENT SYSTEM

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PREPARING FOR VOLUNTEERS

- ⦿ Don't get the cart before the horse!
- ⦿ Prepare systems and resources to handle volunteers BEFORE you ask for help
 - Keep it simple – build organically
- ⦿ DON'T ASK FOR NEW VOLUNTEERS ...
 - Until you can put them to work right away.
- ⦿ But I need help now!!!
 - Don't worry – its easy to get organized
 - One of the worst things you can do is ask for help and then not utilize the individuals who come forward

GETTING ORGANIZED SO YOU CAN PUT VOLUNTEERS TO WORK

- ◎ What are the necessities to get started?
 - Volunteer Needs
 - Volunteer Contact List/ Database
 - Volunteer Profile/Application ... is this necessary?
 - You need to know how to get a hold of them
 - To find out their interests/skills and availability
- ◎ Start Small
 - Only ask for a few volunteers
 - Define tasks you need help with right away then ask for volunteers for specific jobs
 - Approach members individually to fill key positions first before making a general appeal

DO I NEED POLICIES & PROCEDURES?

- Define your needs (Job Descriptions)
 - Position Title and Responsibilities
 - Time Commitment
 - Qualifications/ Skill Sets
- Establish policies and processes:
 - Start a Volunteer Database
 - Communication Chart
 - Who is primary contact?
 - Evaluating New Volunteers
 - Written Policies/ Manual
 - Do I have to?



Volunteer Manual

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RECRUITING VOLUNTEERS

- ⦿ Volunteer Recruitment is an ongoing process
- ⦿ Ask for Help:
 - Some people will offer to help with out being asked
 - But ... most won't come forward unless they are asked!
 - Be SPECIFIC!
 - Don't overwhelm new volunteers ... give simple tasks first
- ⦿ Generic or Open Appeal
 - Public appeal: ask at meetings, event announcements
 - Good Idea for:
 - Low-risk and unskilled jobs
 - Large events – when you need a lot of help!

RECRUITING VOLUNTEERS

- ◎ Specific Appeal
 - Medium to High skill/ risk jobs
 - Identifying individuals with skill sets for volunteer roles
 - What is the need for the position – why is it important
 - What is the commitment
 - What skills are needed
 - Approach existing volunteers first – review profiles
 - Identify new volunteers with specific skills – facebook
- ◎ Intentionally engage members and attendees in conversations to find out what their interests are to identify volunteers for specific opportunities

WHERE TO FIND VOLUNTEERS

- ⦿ Existing Group Members
 - Support the cause/group already
 - Support organization through labor and skill sets
 - Its okay if not everyone wants to volunteer or lead
- ⦿ Outreach Events and Inter-group Coalitions
- ⦿ Family & Friends
 - Be sure to recognize them as much as you do your other volunteers
 - Be careful not to take for granted or draw upon too much

WHAT'S IN IT FOR ME ?

- ⦿ Demonstrate a balance of what's in it for the group, with what's in it for the volunteer.
 - How can they benefit from their experience?
 - What are the specific benefits or perks of volunteering?
 - Remember ... volunteering involves a psychological contract with expectations from both sides.
- ⦿ Meeting the expectations of volunteer and is important to ensure ongoing volunteer support.
- ⦿ What are Benefits for Volunteers?

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EVALUATING NEW VOLUNTEERS

- ⦿ Have potential volunteers complete profile/ application
 - If you are just starting this process ask current members to complete process as well.
- ⦿ Follow-up promptly with new volunteers
 - Thank them for interest & what to expect next
 - Auto responder on Volunteer Profile submission form

ORIENTING YOUR NEW VOLUNTEERS

- ◎ Provide regular orientation opportunities
 - Introduction of group leaders
 - Group history
 - Review Policies & Procedures
 - Create a Manual

Volunteer Orientation



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GETTING VOLUNTEERS READY

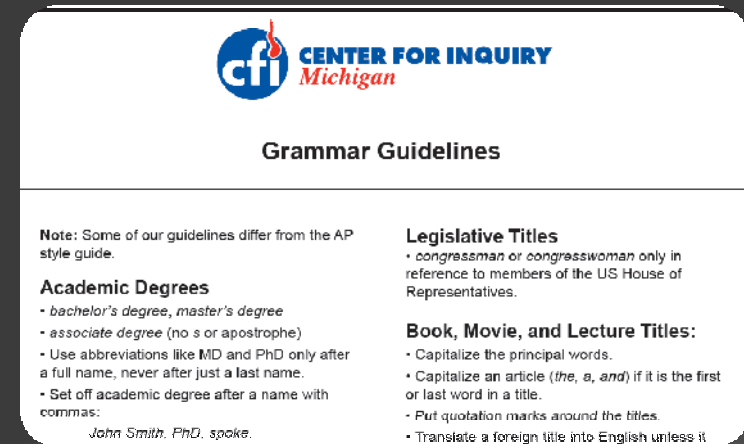
- ◎ Things to Consider in Matching Volunteers to Tasks
 - Importance/ Time Sensitivity of each task on your list?
 - How can you best use the person's skills?
 - Will the task challenge the volunteer?
 - Is it something they might enjoy?
 - Can the volunteer fulfill the responsibilities?
 - How long will the project/ volunteer commitment will last?
- ◎ Ask don't assign tasks or roles!
 - Renee & Phone calls

GETTING VOLUNTEERS READY

- ◎ Match interests with opportunities ... if at all possible
 - What if an important task/role is outside of a volunteers (stated) interest areas, but they have the right skills?
 - Discuss possibility with volunteer, explain need and ask if they are willing to accept the position
 - Be ready for a “no” & have other opportunities to suggest
- ◎ Task/ Role matching is an ongoing process
 - Follow-up with newer volunteers after they have started and explore what areas they are really comfortable working in.
 - They may not say “no” to tasks they really aren’t comfortable with until they get to know you better.

EMPOWER VOLUNTEERS WITH TRAINING

- ◉ Volunteer Training = The Key to Success!!!
- ◉ What information do they need to be successful?
 - Based on Job Descriptions:
 - Needed Skill Sets
- ◉ Standardize Procedures
- ◉ Create Training Guides
 - How To's for Jobs
 - Grammar Standards
 - Formatting Standards
- ◉ Orientation



PUTTING VOLUNTEERS TO WORK

- ⦿ Do the Dirty Jobs Yourself.
- ⦿ Clearly Define volunteer roles/tasks
 - Rely on your Job Descriptions
 - Divide larger (complex/time intensive) roles in to individually manageable jobs/ tasks
 - Train multiple people to be responsible for each position
 - Additional volunteers can act as proofreaders
 - *Example: Calendar & Emails management*

PUTTING VOLUNTEERS TO WORK

- ◎ Be Explicit when Assigning Tasks
 - Clearly Outline Requirements, Outcomes & Expectations for each task.
 - Define length of time needed to complete tasks
 - Don't under estimate time for tasks
 - If in doubt ... Over estimate or give a time range
 - Remember: tasks will take longer for new volunteers
 - Allows members to make educated commitment, and enable them to follow through
 - Give A Specific Deadline
 - Example: Joel & Emails

FILLING KEY VOLUNTEER ROLES

- ◎ If you have more volunteers than you can handle
 - Don't ask for more, even if it is for an important role... until you can manage additional volunteers.
 - You've survived this long, you'll make it a little longer
- ◎ Round Peg in a Round Hole
 - Be patient, don't rush
 - Wait until you find the right volunteer to fill a role instead of trying to fit someone into a role they can't really handle

ENSURING VOLUNTEER SUCCESS

- ◎ Clone yourself through your volunteers
 - Delegation is essential
 - Train your volunteers and then trust them
 - Empower your volunteers to make the best decisions they can be authorized to make & be clear about when you need to be brought into a situation.
 - Train established volunteers to lead other volunteers - so new volunteers can get help and answers from someone other than you

ENSURING VOLUNTEER SUCCESS

◎ Event Volunteer Training

- Event volunteers provide the first impression of your group
- Give them the knowledge to answer questions or know who to ask if they don't know the answers.
- Include it as part of Volunteer Orientation – that way every volunteer is an event volunteer

◎ Don't forget special event volunteers

- Have a volunteer meeting prior to special events
- Provide written instructions so event volunteers can reference them throughout the event ...and don't have to come find you every time little issues arise

ENSURING VOLUNTEER SUCCESS

- ⦿ Use Checklists
 - Event Planning
 - Event Management (setup/tear down)
- ⦿ Resource Binders
- ⦿ Google Docs
 - Shared Folders
 - Various Permission Levels
 - Using Links

VOLUNTEER RESOURCES

Speaker Name	Panel Discussion :: CCC & CFI			
Speech Topic & Date	God What is it Good For ? :: September 21 & 24, 2008			
Contact Info:				
Pre-Meeting	Due By:	Assigned To	Completed	Due Date Guidelines
Confirmation Letter, Speaker & Presentation Sheet to		Jeff		At Booking
Confirm Contact Information/Obtain Cell Phone #		Jeff		
Get Title, Bio, Photo, Talk Description		Jeff/ Jen		ASAP/ min 1 mth prior
Post on Events Web Calendar		Bob Rectenwald		ASAP
Add Speaker to Mailing List		Jen/ Nancy		At Booking
Newsletter to speaker (Current & Qtr of Speech)		Jen		send current @ booking
Book Airplane Tickets		Jen		ASAP
Reserve Hotel Room or Schedule Host Home		Jen		min 1mth prior
Assign Driver/ Host				2 weeks prior
Schedule Dinner w/Speaker and Guests		Jen/ Jeff		1 week prior
Press Release				at least 1 wk prior
Order Books		Jen		min 2-3 weeks prior
Draft Enews & Reminder eNews		Don		draft 2 wks prior - min
MySpace Event Reminder				1 week prior - min
Facebook Event Reminder				1 week prior - min
Create & Distribute Fliers				1-2 months prior
Coordinate Mailing to Subscribers w/ Amherst				1-2 months prior
During Meeting	Volunteers: assign ASAP, reminder @ 1 wk prior: set up at 6:15pm			
Announcements/Introduction				
Signs/Banners		Jeremy/ Jason		
Video — Camera Operator				
Video — Release form from speaker				
Sound — Setup		Josh		
Sound — Backup wired mic on stage		Josh		

VOLUNTEER RESOURCES



Event Setup and Teardown

Information Table

The information table contains free literature about CFI and affiliated organizations, along with upcoming event calendars, promotional freebies, and more.

The materials for this table are located in the box in the storage closet. Setup and teardown for this table can take longer than the other tables.



The table should contain these items, arranged neatly and visibly:

- CFI brochures and CFI Transnational flyers
- Maps to the after-event social
- Upcoming event calendars
- Flyers for special upcoming events*
- Donation canister and sign
- Blank paper name tags and markers
- Friend of the Center forms and Pledge forms*
- Promotional stickers (Darwin fish and Doubt)**
- Free Inquiry subscription form
- Pens
- Mailing and email list sign-up sheets*
- FOC name tags and sign

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KEEPING & DEVELOPING YOUR VOLUNTEERS

- Get to Know the members – Ask about background/ life story, family, job, personal interests
 - Assists with making connections among volunteers and on a personal level with staff and managers
 - connections/personal relationship with volunteers make it easier to ask them to help
- Building a network of friends & acquaintances = greater investment for CFI and for volunteer

KEEP THE COMMUNICATION FLOWING

- ⦿ Regularly keep in touch with all volunteers
 - Feel valued and more involved (*didn't forget them*)
 - Leads to increased willingness to volunteer
 - Episodic and occasional volunteers too!
- ⦿ Continue to offer new volunteer opportunities, even if they have to decline multiple volunteer opportunities before saying “yes” ... a little guilt never hurt either
- ⦿ Ask volunteers to do something else right after they successfully complete a task - they will be more willing to volunteer and take on more responsibility.

SO HOW DID IT GO?

- ⦿ Seek feedback continually and listen to input
- ⦿ Follow-up with each volunteer after they complete each task
 - See how it went
 - How did they like the task
 - Willingness to continue in role or do similar tasks in future
 - Ask if they have input about improving task process
- ⦿ Add feedback to volunteer contact records
- ⦿ Based on feed back adjust assignments or reassign volunteer all together.

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THANK YOU, THANK YOU, THANK YOU

- ◉ Did I Say Thank You?
 - You really can't thank volunteers enough.
 - Give 'em Schwag: Magazines, CFI gear, etc.
 - Thank You Cards & Gifts – ask for donations
 - Volunteer Appreciation Events
- ◉ There is no greater form of volunteer recognition than incorporating their ideas – use that feedback and thank them (if you can't, let them know why)
- ◉ Monthly newsletters/emails - announce upcoming opportunities, what's going on, volunteer acknowledgement & appreciation

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VOLUNTEERS WHO AREN'T FITTING IN

- ⦿ Things just aren't clicking or having increasing difficulties - is it you?
- ⦿ Is the volunteer in the right position?
- ⦿ Discuss with volunteer and redirect to a different role
- ⦿ If all else fails: gracefully find a way to let them go
 - Get multiple people involved in this entire process
 - Have solid reasons (document) why it isn't working out
 - Be Gracious - let them know that their help is appreciated, but that you don't have a position that they fit in and that you are releasing them as a volunteer.

WE HATE TO SEE YOU GO

- ⦿ Life Happens ... plan for turnover
- ⦿ Good Communication – helps prevent problems
- ⦿ Have a back-up plan – train multiple volunteers
- ⦿ Release volunteers from their jobs gracefully
 - Maintain good communication so you know when things are getting tough for volunteer
 - Thank them for their help
 - Invite them to volunteer again in the future

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