

Herding Cats: How To Get Them and How To Keep Them

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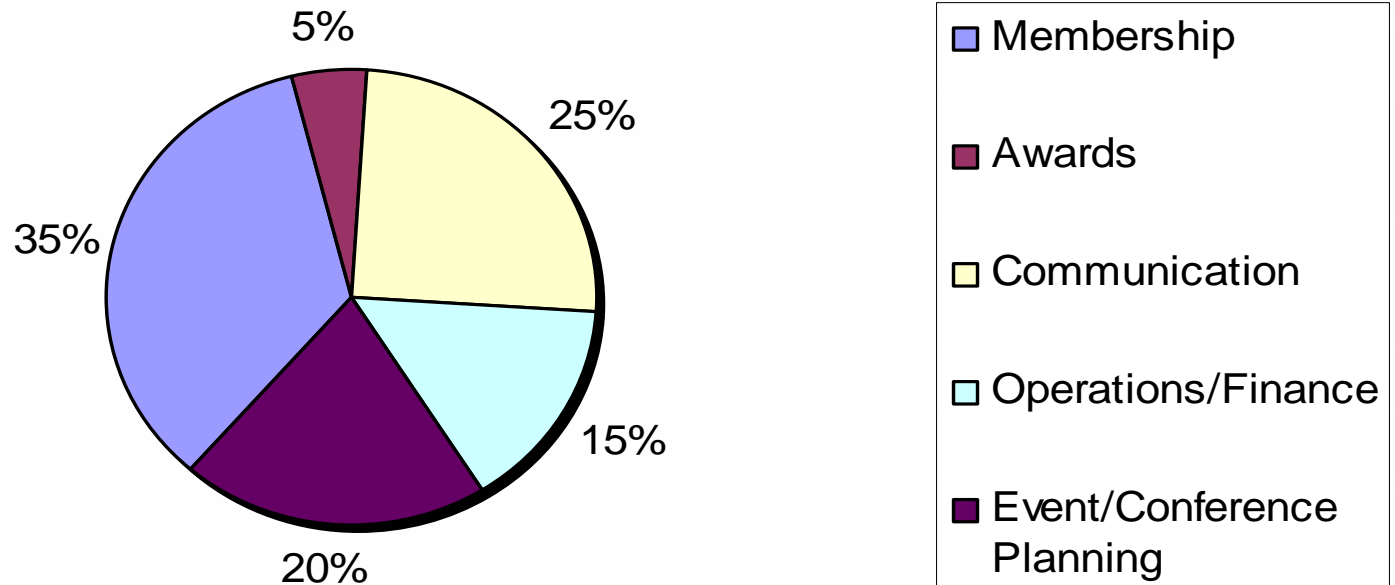
A Section/Division as a Business

- Each component (Section/Division/SIG) of the Society is in many ways its own small business
 - Staff (leaders and volunteers)
 - Clients (members and conference/event attendees)
 - Operational Standards (compliance regulations and reporting needs)
 - Departments or “areas of operation”



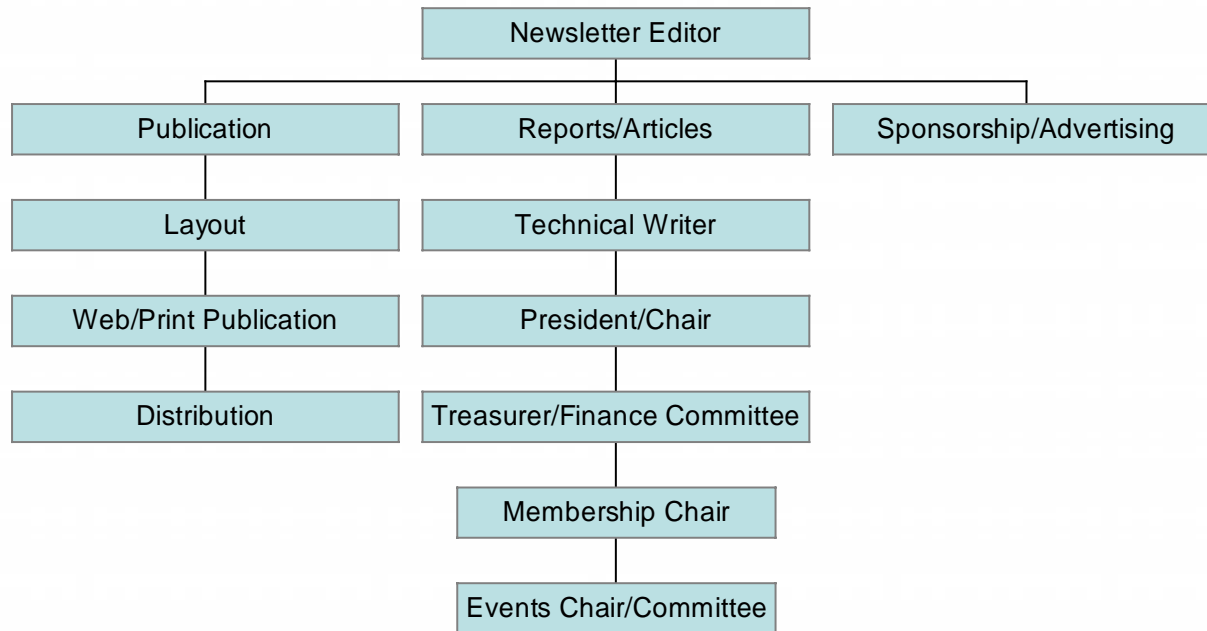
Business Units/Departments

Where Does Your Business Spend its Time?
(sample only)



Function of a Business Unit

EXAMPLE: Communications - Publishing a Single Newsletter Issue



What's the Bottom Line?

- What has to be done?
- Who is going to do it?
- Why will they stick around to get it done?



What Has to Be Done?

- Identify the department/business units of your group
- Develop a *codified, clearly defined, action plan* that outlines how to run the business
- Research what resources are available to complete the action items
- “Hire” people to complete the tasks



Who are you going to get to do it?

Volunteers!



What Do We Know About Volunteers?

- 45% of men and 52% of women volunteer. Men and women between the ages of 25 and 54 are the most likely to volunteer
- Volunteers keep mental lists of what they give and what they get from the relationship
- Volunteer opportunities that require long-term commitments are intimidating to those whose time is already at a premium
- Broad, undefined tasks are barriers to getting member involved for the first time
- It's up to us to understand what a volunteer needs in order to make certain they choose our association as the recipient of their contributions



Tactics for Attracting Volunteers

- **TACTIC 1: Get ‘em while they’re hot.** Reach out to members right after they join and when their interest in the organization is first piqued.
- **TACTIC 2: Keep asking.** Advertising for volunteers in newsletter and making announcements at meetings serve as constant reminders to members that their time & talents are the lifeblood of a healthy organization. However, actually recruit volunteers one-to-one at meetings, via telephone, or in writing.
- **TACTIC 3: Follow up.** Even if a member says no when first approached, the fact that you asked makes him/her aware of the need for volunteers. It lets that member know that there is a place for him/her in the future.

“Tactics for Attracting Volunteers” available at www.4spe.org/communities/ld



Why will they stick around to get it done?

What Volunteers Need

There are twelve basic needs that volunteers (and leaders!) share. These are needs that must be met if volunteers are to be successful and if you want to retain them year after year.



A specific and manageable task with a beginning and an end

Volunteers, especially new ones, need to know exactly what they are being asked to do and how much time it will take. Broad and vague goals can be frustrating to volunteers because they don't know what they are being asked for and therefore won't have a sense of fulfilling their goal.

- Determine the deadline for completing the project
- Break the project down into groups of major tasks to be done or, if the project is smaller, break it down into small tasks that are achievable in a short time
- Clearly define each task to help ensure that a member will agree to volunteer and that the task will be completed
- Write it down

“Project Planning Worksheet” available at www.4spe.org/communities/ld



A task that matches interests and reasons for volunteering

When recruiting volunteers, it's important to recognize that each volunteer has his/her own reasons for getting involved. When recruiting, it's important to recognize these differences and match the tasks, work environment, and rewards to the individual's own reasons.

- **Find out what motivates your member.** Survey the interests and preferences of members both when they join and on a semi-regular basis.
“Volunteer Interest Form” available at www.4spe.org/communities/ld
- **Match up interests with tasks.** Analyze survey results to identify who best fits with which activities. Then offer opportunities based on matches.
- **Offer alternatives.** If a member is not interested in the task you first offer, give him/her options.



A good reason for doing the task

Volunteers need to know that their contribution is important. They find time to work on projects that contribute to goals that they support. They are motivated when they feel they gain in some way. Volunteers are more likely to complete tasks (on time) when they know that others are counting on them.

- **If the work is not important, stop doing it.** If a task or project is not a critical element of your overall mission, goals, or strategic plan, is it still necessary?
- Make sure your volunteers know that what they're doing is important to the organization
 - How does their task fit into the whole?
 - What's at stake if the task isn't completed?
 - Remind them what's in it for them (based on their reasons for volunteering)
- Make sure your volunteer knows he/she is the best person for the job... not just the person who said yes



Written instructions

Volunteers need a clear understanding of the commitment and expectations. Communicating the specifics in writing will increase the odds that he or she will say yes and that the task will be completed satisfactorily.

- Provide clearly written instructions for what you want
 - Time and date of meeting commitments (in-person, telephone, etc.)
 - Interim deadlines, reporting dates
 - When and how any missing information will be provided
- Give volunteers the opportunity to ask questions



A reasonable deadline for completing the task

The best volunteers are already extremely busy. Often, people with conflicting demands prioritize work based on deadlines. Therefore, it's critical that you set a specific due date. This also signals that the task has an end-point.

- Set the deadline for completion and tell volunteers about it before they commit to the task. Confirm the deadline in writing when you send your follow up letter/email
- Make certain your volunteers have everything they need to complete the project on time
- Plan for interim reports to make sure your volunteer is on target/monitor your volunteers' progress through regular reporting/checking in.
 - **Contact volunteers regularly and a few days ahead of the due date to remind them of the deadline**
 - Urge volunteers to let you know as early as possible if they can't make a deadline.



Flexibility to carry out his/her task

Not all tasks have to be done in face-to-face meetings. Requiring all volunteers to drive to a central location may waste time and turn some people off. Many need some flexibility in when/where they perform tasks.

- Don't assume that volunteers have a work alone/in a group preference
 - Give volunteers who do not value the “networking and social contact” benefits of participation the opportunity to work on their own
- Minimize the time and cost of travel by holding meetings only when necessary. Arrange meetings by phone to reduce travel/time inconveniences.
 - **Tip:** Limit conference calls to 60 minutes and distribute a meeting agenda in advance



Necessary Tools and Support

It's important to give volunteers everything they need to complete the task without interruption. If a critical element of information is missing, volunteers will probably set the project aside, thus increasing the chances that deadlines will not be met.

- Think the project through before turning it over to the volunteer and provide everything they need up front.
 - Don't expect a volunteer to take the initiative and secure what is needed (especially if they are new and inexperienced!)
- If you are counting on a volunteer to provide specific resources for the project, make it known



Training and Information

Few volunteers will ask for training. Don't assume that volunteers know how to perform a task.

➤ Training ideas

- A short meeting to review a process
- Partnering with a “senior volunteer”
- One-on-one training
- Written guides with step-by-step instructions
- Use Role-playing for interactive, script-based activities (phone calls, in-person recruiting)



A safe, comfortable and friendly environment

A friendly, welcoming environment goes a long way. For example, insufficient / inconvenient parking or poor lighting can turn your volunteer off before he walks in the door. It's important to make the experience of being involved as pleasant as possible.

- Make sure your meeting / event notice contains the address and/or telephone number of the meeting place. Make sure the location has parking
- Don't forget you're the host. Greet people and quickly introduce them to other member(s) of the group so you can move on to other participants; allow time for volunteers to get acquainted
- Make sure your volunteers are happy. Ensure that each volunteer successfully completes his/her task and walks away with a feeling of well-being and a positive image of the association as a result of the experience



Follow-up

Stay in touch with your volunteer. Make sure the volunteer is comfortable with their task. This will also help ensure that the task is being completed.

- Volunteers are colleagues and partners, not employees / subordinates. As long as the instructions are clear, you should be able to trust that your volunteer will complete the assigned task.
- **As the team leader (manager) of a project, it's important that you don't get bogged down with the work yourself. Your job is to lead the team – this means troubleshooting and monitoring progress**
- Praise publicly and criticize privately. Nothing will chase a volunteer away faster than feeling embarrassed
- Understand when life gets in the way. If this happens, let them know you understand and release them from their commitment. **Make sure you leave the door open for future involvement when the situation changes.**



An opportunity to provide feedback after the task is completed

It's important to capture what works (and what doesn't!) before your volunteers have moved on to the many other things in their lives.

- When you are wrapping up a project, ask for feedback from your volunteers and solicit interest in future involvement. Entice them with an incentive. Trade feedback for free admission to an event.
- Evaluate the performance of your volunteers. Who performed really well and might be groomed to move up the ranks; encourage those individuals to move into a position with more responsibility
- Ask for a written report from the project team leader that summarizes how the project was completed.
- Identify next year's project coordinators **and approach them before the project ends**



Recognition/Rewards that match the reasons for volunteering

Overall, this need is one of the easiest and least expensive aspects, yet it is frequently overlooked. No matter how small the contribution, each volunteer deserves acknowledgement that what he/she did was appreciated. No one has ever complained about being praised too much!

- When volunteers complete the task or fulfill their time commitment, thank them and let them go – don't belabor their generosity.
- Thank your volunteers personally. A simple hand-written note sent after the project is complete is the most basic and effective expression of gratitude. Avoid sales incentives and reward models.
- Reward and recognize everyone who contributed, not just the top producers. "This event would not be possible without the help of"... a little goes a long way.



Don't Forget!

- It's important to keep your operations running while working through your new business model
- Allocate your resources and set up an implementation plan to break down the work load
 - Use the tools and services available on the Leadership Services Webpage (www.4spe.org/communities/ld) and at SPE Headquarters
- Develop incremented, achievable goals
- Reward *yourselves* for the great work you're doing!

