

Volunteer Kit



Tools, tips and techniques to recruit and retain volunteers

This handbook has been written for the directors, staff and current volunteers at not-for-profit organizations. It is designed to give practical, easy-to-implement suggestions on how to get and give the most through the volunteer experience – and in the process, gain the most as an association.

In this handbook, you will find hints to help you recruit potential volunteers in your association, interview them, train them and evaluate them. It discusses the steps in effective meeting management, from setting an agenda to guidelines for running a productive meeting. The normal governance structure and decision-making model at the association level are presented along with a division of labour between staff and volunteers. There are also many creative suggestions on how to better handle the all-too-often forgotten task of appropriately recognizing volunteer contributions. In the final section, the handbook offers a path that experienced volunteers can continue to follow in order to contribute to their profession at the local, provincial and national levels.

In order to understand the volunteer experience, we interviewed a cross-section of volunteers – both those new at their tasks and old hands. While the individual experience of volunteers vary, they have been universal in their praise of the volunteer experience and emphatically stated that: “Volunteers get back more than they give.”



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Motivated • Dedicated • Productive

It is more difficult to attract volunteers today than it was 10 years ago. There are a number of reasons for this, lack of time being the most common reason given. A pro-active response to the declining numbers of volunteers is required and this handbook contains many ideas on how to get people to volunteer for their professional organizations.

Volunteer Canada reports that one in four Canadians volunteer in some capacity. Five percent of those individuals contribute over one third of all volunteer hours. In other words, very few are carrying a significant volunteer workload.



Further research by Volunteer Canada suggests that volunteer work is no longer simply a one-way sacrifice of time by the volunteer. Today, volunteerism is a negotiated and mutually beneficial arrangement between an individual and the organization they volunteer for.

Did you know?

- Average number of hours contributed per volunteer in Canada in 2000: 162
- Percentage of Canadian volunteers who contributed 73% of all volunteer hours: 25%
- Percentage of volunteers who get involved in volunteering because they were asked by an organization: 30%
- Percentage of Canadians between the ages of 35 and 54 who volunteered in 2000: 30%
- Percentage of total volunteer hours contributed by Canadians employed full time: 46%

Laura Leyser

Her volunteer experience built up her self-confidence and she learned that volunteering helps you feel good about yourself.

Why Do Members Volunteer?

The reasons that people volunteer are as varied as the people themselves. They can include a desire to:

- Serve an important cause
- Explore a personal interest
- Give something back to their profession
- Fulfill a social need (friendship, recognition, visibility or affiliation)
- Explore and improve career interests
- Build a resumé and network
- Develop skills, knowledge and experience
- Find challenge not found in their current job
- Accomplish something that you cannot achieve alone
- Find personal fulfillment

What do Volunteers Experience?

Volunteers report that they gain at least as much from the experience as they put in – often exceeding their effort and expectations. Volunteers have praised the experiences as an ability to:

- Make important networking contacts; meet new people and make new friends
- Provide an opportunity to apply existing skills and develop new skills
- Contribute to work experience
- Build self-esteem and self-confidence
- Feel needed and valued
- Make a positive difference in the profession
- Express gratitude for help received in the past
- Create a sense of achievement
- Provide the challenge of learning something new
- Offer rewarding training opportunities
- Receive appreciation and recognition
- Enjoy the personal satisfaction of helping others
- Work on causes of important issues
- Experience a change of pace
- Have fun

Did You Know?

30% of people volunteer because they were ASKED. Who can you ASK to make a difference in your organization?

The rewards are as unique and personal as the reasons for wanting to volunteer.

Today's Issues of Concern

There are many hot issues that require volunteer leadership today. Your association may be working on issues as far-reaching and challenging as:

- Meeting the standards of the privacy legislation by assisting members to be compliant
- Attracting qualified, motivated volunteers
- Communicating to members via dynamic websites and newsletters
- Assisting members to adapt to new technology

Planning, an essential first step for the success of any volunteer program, involves designing volunteer positions, developing applicable policies and procedures and educating others in the organization about how to involve volunteers. In many associations this background planning work is completed on a regular basis and has been part of the natural planning cycle. When you have taken care of these planning items, you have a solid foundation to support your volunteer program.



You are now ready for the recruitment stage. Be creative as you brainstorm the who, why, where, when and how. Who would be the ideal volunteer? Why would they be interested in your volunteer opportunity? Where and when can you reach these people? How can you create a recruitment message that encourages potential volunteers to volunteer for your organization?

Targeting Candidates

Volunteers have valuable contacts who could serve the advancement of your organization. Give specific thought to the skill sets you need before you tap into that network.

For example, someone with:

- Financial knowledge can serve as Finance Chair
- Legal knowledge can provide advice prior to verification with bylaw committees
- Event planning skills can work with staff to plan activities
- Human resources expertise can work with staff to support volunteers
- Arts appreciation can obtain fundraising contributions through a silent auction
- Political or business connections can use networking to advance your organization's mission

Writing the Message

Your request for volunteers – be it in scripts, presentations, ads on the website or your newsletter – will be more powerful if it is as specific as possible. Write a short, enticing message that defines the task, outlines required qualifications, details the time commitment required and spells out the benefits to the volunteer and the organization.

See which of the following two messages would be more likely to attract attention:

Looking for volunteers.
Call Mary Doe at 888-555-1212 today.

Your association needs YOUR expertise if you have a knack for understanding how computers can help make our lives easier and a spare long lunch every three months. Give Mary Doe a call at 888-555-1212 today. You'll be working with great people helping us all work better.

Gary Zalepa Jr.

Gary doesn't think of volunteering as "work without pay." Rather he views volunteering as an opportunity to move the profession forward and in return gain wisdom that serves him in his own practice.

Getting the Message Out

There are an unlimited number of vehicles that you can use to get the message out. Review this list to see which would work for your association. There is no one magical way to get the message out, so feel free to try as many ways as possible.

- Place an ad on your website with a hot link that describes the volunteer positions you are currently recruiting for
- Create a regular column in your newsletter that informs, advertises and ASKS for volunteers
- Ask current committee members to come to the next meeting with suggested names for potential volunteers
- Use the same committee member's word-of-mouth to get the recruitment message out
- Prepare a script to be used by all event hosts that highlights volunteer opportunities and benefits
- Create a We-Need-You brochure to advertise the need for volunteers. Be sure to include volunteers' testimonials
- Use tag lines that invite members to volunteer on all staff correspondence
- Create opportunities for members to volunteer online or through conference calls rather than in person, eliminating their need to travel to meetings

Quick Tip

Do committee members really need to be in the same room at the same time to work on a given task? In many cases the answer is no.

Current and former volunteers are the best salespeople. Why? They have benefited from their own contribution, they know the organization well and their enthusiasm can be infectious.

Attract the New Volunteer

New volunteers are often especially attracted to the networking aspects of volunteering. Young volunteers will respond to approaches that focus on the need for their fresh, innovative ideas and those that highlight career advancement potential.



When you are asking for their volunteer time, consider that their special motivations are likely to include:

- A need to network with peers
- A desire to better understand local markets
- A need to give back to the profession
- A wish to enhance their career
- The need for appreciation and recognition
- The need to belong

Volunteers today are task orientated – be prepared to talk about the type of service and skills needed and time commitment they'll need to make.

Did You Know?

Peer-to-peer approaches work best with seasoned professionals. Have a current volunteer approach a peer with a specific volunteer task in mind.

Have a volunteer of a similar age approach their peer to outline the opportunities available.

Sell • Qualify • Motivate

Although more often associated with the sale of a product or service, volunteer recruitment also includes sales in its cycle of success. Once you have identified volunteers, the potential candidate is likely to have objections or at least questions that require some careful responses on your part. It is important to be thorough in your answers, but still be committed to convincing a candidate that volunteering is both important and useful.

Through the process of an open, honest conversation you will be able to address their concerns, paraphrase their interest and understand the contribution they can make. As you address a candidate's concerns, understand that sometimes people are expressing a legitimate objection and at other times, they are simply seeking a better understanding of the volunteer role.

Steps for Handling Objections

Step 1: Hear them out

While the objection may sound familiar, each person can have a unique twist.

Step 2: Consider your options

As you are listening, you can begin to consider your initial strategy to minimize, ignore or handle the objection. There are times, especially when hearing knee-jerk objections, you will want to ignore the objections and keep on selling.

Step 3: Acknowledge objections

Start by telling the prospect: "I'm glad to hear you say that. I know exactly what you mean", or "Thank you for bringing that up; it's a good point. In fact, many people who have taken advantage of the opportunity have had that same thought." Then present the information that dispels the problem.

Step 4: Treat an objection as a question

For example, if the objection is one of procrastination (busy right now, but maybe next year), say: "Yes, I understand your point, but the question is whether this is the right time to volunteer."

Step 5: Find out if the voiced objection is the only one

Ask: "That's a good point to consider. Your question is whether this is the smart thing to do right now, isn't it?" When he/she replies, "it is", follow up with: "Well, you do like the idea, don't you? If you were sure time wouldn't present a problem, would there be no other objections?"

Step 6: Use the same line of reasoning as the candidate's objections

Agree wholeheartedly with the prospect. For example, say, "You are so right! You can't keep taking on additional obligations forever. But really, this opportunity doesn't add obligation – it helps you remove them! Here, let me show you how it can."

Step 7: Restate the objection

Paraphrasing the objection can provide you with a platform from which you can better answer the objection.

Step 8: Answer the objection

Many people skip steps one through four and immediately answer the objection. By completing the first four steps, however, you gain an understanding of your candidate's point of view – and also earn his/her trust – enabling you to choose the most meaningful information for this candidate.

Step 9: Confirm the answer

Once you have handled the objection, check in with the candidate to make sure your response satisfies his/her concern.

Step 10: Sell the benefits and lead into the close

Once the objections have been handled, review the major benefits for this candidate, and bridge to a close: “Now that we've discussed what is involved in the position, would you be more interested in serving on the Conference Committee or the Finance Committee?”

Traps to Avoid

When you are speaking with a candidate, there are some pitfalls that are easy to fall into. It is important to keep the conversation in a positive, open style. Here are some common traps and ideas on how to overcome them:

- Never interrupt, anticipating what the person is trying to say. You'll probably misunderstand and offend the prospect. The person will be much more relaxed and receptive if you let him/her finish the question.
- Don't place undue emphasis on any objection. It may simply be a question.
- Never treat any objection as an unjustified question, either by facial, vocal or body expression.
- When answering an objection, avoid an argument by using such phrases as “I suggest” and “as you know.”

Common Objections

Recruiters of volunteers must be prepared to respond quickly and confidently to the objection they'll encounter when presenting opportunities to a potential volunteer. Here are some examples of objections that have been raised by potential volunteers. Check off those that ring true in you and brainstorm others that might arise.

“I am too busy, I don't have time.”

I certainly understand. We will be glad to work around your schedule to the fullest possible extent. In fact, if you could spare one hour per month, we could offer you a seat on our virtual Advisory Committee.

“I don't have the right qualifications/I don't have enough experience.”

You'd be surprised. Our committees need a broad mix of people with various personal and professional backgrounds. The fact that you are a member already connects you to our industry. And, if you need training, we will provide it.

“I don't get a good return on my time spent.”

I am confident that you'll find the experience enriching. This is a great way to contribute to an organization that exists to help you. There is no other organization that represents the continued improvement of our profession. It is a great way to network and influence decisions.

“There is too much bureaucracy and politics.”

The association tries to reflect the views of the majority of its members. Both the profession and market have both become complex. It takes a consultative approach to make sure we have the best solution to any issue. By virtue of that, it takes longer to come to a decision. It is a part of the democratic decision-making process.

“I don’t like the decision making by committees. It is too slow.”

The decision-making process entails respecting the views of the majority. The management itself takes some key decisions and you are free to suggest ways to make the process faster and more accountable. Active volunteer participation is one great way of improving the quality of governance.

“I don’t like the way things are run right now.”

As a volunteer, you have the opportunity to influence the management process rather than be frustrated on the sidelines.

“The board of directors is just for successful members, not for the little guy.”

This is a common misconception. It’s true that those successful in their progression have more people available to become involved with our committees and task forces. But our programs are designed to appeal to all members and this is a great opportunity to make sure that the voice of your business is heard.

“I have too many other commitments including other volunteer duties.”

By volunteering with the association, you will also benefit by learning more about the market through contact with your peers. Can you help by preparing recommendations to the board of directors?

Interviewing Candidates

Getting volunteers is an important task for your association. However, getting qualified volunteers is even more important to your success as an organization. To determine someone’s interest, skills, and qualifications, use this interview guideline. It will also help you subtly communicate the nature of the commitment.

As you add questions of your own, make sure that they can’t be answered by a straight yes or no: you’ll learn more about the candidate with open ended questions. Schedule sufficient time for the interview and do not go over the agreed upon time.

Interview Guideline

- How long have you been a member with this association?
- What is your employment history?
- What is your educational background?
- What life experiences have you had that might be helpful to your volunteer work?
- Have you had any previous experience as a volunteer?
- What kind of work did you do?
- Why are you interested in volunteering with us at this time?
- What issues are you passionate about as a member? Why?
- What do you hope to gain from being a volunteer?
- What kind of volunteer role interests you?
- Can you make a one-year commitment to attend four three-hour meetings a year?
- Is there any other information that you would like to provide?

Remember that this process is a discovery phase. After you have conducted the interview, take the time you need to reflect upon what is best for the volunteer and your organization. Match the volunteer's interest and skills to the committee that best suits them personally and professionally. Be sure to get back to each candidate.

With all candidates, remember to keep your commitment to them as well. Be sure to specify a time that you will get back to them regarding their participation and honour that commitment.



Quick Tip

The goal of the interview is to get the potential volunteer to talk about themselves. Limit the time you talk. Extend the time you listen.

New volunteers want to get to work, but naturally begin their service feeling a bit lost in a new and different environment. Help new volunteers become effective as quickly as possible by providing them with a comprehensive orientation on the nature of your organization, the role of the board of directors and the committees, and how exactly they fit into the big picture.

This section discusses some key first steps that will go a long way to getting everyone down the right path. The first is creating a clear job description. The second, is providing detailed training on the roles and responsibilities of the volunteer's specific committee and finally, providing general training on how the committee fits into the big picture of the organization's goals and objectives.

New volunteers would certainly appreciate receiving information like the points mentioned below in the background information section. Alternatively, this could take the form of an event, where seasoned volunteers and staff make presentations on topics of interest to new volunteers.

Provide Background Information

There are a number of documents that may be useful to volunteers. Check off the ones that would be helpful in your association:

- Volunteer Job Description
- Committee Terms of Reference
- Role of Volunteers and Staff
- Bylaws, Policies & Procedures and Rules & Regulations
- Mission Statement, Goals, Strategic Plan and Governance Model
- Financial Statements
- Contact Information for Fellow Committee Members and Staff
- Meeting Schedule
- Past Meeting Minutes and Reports
- Expense Policy

Directors, in particular, might also find the Directors and Officers Liability Insurance Policy to be helpful.

Quick Tip

Don't forget that even seasoned volunteers deserve on-going training. There are organizations that offer workshops on specific disciplines that can help volunteer committees meet specific organizational objectives.

Volunteer Job Description

The easiest way to allow a volunteer to understand what is asked of them is to provide them with a job description. The job description should cover these points:

Job Title:

Communication Committee Member

Job Description:

- Contribute ideas on how the association could enhance communication efforts with members and the general public
- Work with staff to critique communication
- Provide suggestions for new topics to be covered in publications or on the website

Reporting Structure:

- Committee members report to the Chair of the committee

Responsibilities:

- Attend scheduled meetings
- Contribute ideas
- Volunteer to do work between meetings
- Serve the needs of the association

Qualifications:

- Three years of work experience
- Effective communication experience

Term of Office:

- One year (possibility of additional one-year terms)

Average Time Commitment:

The committee meets four times annually for three-hour meetings held in the morning

Measures of Success:

- Enhanced communication
- A high-performance committee
- Regular evaluation of communication effectiveness of the association

Benefits:

- Complimentary ticket to Annual General Meeting and Luncheon

Committee Terms of Reference

With a few notable exceptions, most volunteers contribute to association activities through a committee. Like the job description for individual volunteers, the scope and mandate of a volunteer committee needs to be understood by everyone involved. A Committee Terms of Reference provides valuable answers from the outset: What exactly is the committee accountable for? How does it get funds if it needs them? Who on staff is assigned to help the committee and to what extent?

The Terms of Reference should include:

- Name of the Committee
- Purpose of the Committee
- Accountability of Committee
- Responsibilities
- Committee Composition
- Chair Selection Process
- Terms of Office
- Frequency of Meetings
- Name of Staff Liaison

Don't underestimate the value of Committee Terms of Reference and Job Description for Volunteers. By providing them you avoid the risk of duplication of effort, confusion and frustration on the part of your volunteers.

See Appendix A for a sample.

Staff Provide Support for Volunteers

Volunteers look to staff to provide them with support. Typical examples of staff support activities include:

- Scheduling meetings and preparing agendas
- Taking meeting minutes
- Conducting research prior to directors' meeting that will assist directors in making informed decisions
- Preparing correspondence for volunteers to sign
- Making phone calls on behalf of volunteers
- Providing training
- Preparing reports
- Writing speeches
- Developing mandates for committees and task forces
- Developing new directors' orientation programs
- Assisting with media relations
- Keeping members and directors informed on major issues

Quick Tip

Be careful not to overload (translation-overwhelm) a new volunteer with more information than they can reasonably process at one time. Volunteer orientation is best treated as an ongoing activity introducing new information on a staggered schedule. Volunteer's roles are to set policies and approve programs, services and budgets. Staff's role is to implement the volunteer-led committee's decisions.

Supervision and Evaluation

Volunteers, like anyone charged with completing a task, must be evaluated regularly and consistently in comparison to a standard of expectations. Ideally, this evaluation should first be completed in writing by the supervisor and the volunteer and then discussed in person. Comments should also be about the individual’s contributions through the position, and should not be personal in any way. In order to be more effectively heard, and to form a benchmark for further contributions, the evaluation should be based on quantitative data.

Although the frequency of the evaluation will vary with the mandate of the committee, it should correspond to any milestones achieved by the committee. A semi-annual review is likely to provide effective feedback mid way through a term, and in the process improve the quality of contribution for the balance of a one-year term.



David Armstrong

“David admits that he does not enjoy “association politics” and therefore only accepts roles related to his skills and interest.

David cautions that it is not wise to pressure someone to volunteer; he has witnessed that such people often don’t follow through and their meeting attendance is less than exemplary.”

Evaluation

The board of directors should also conduct a self-evaluation. This discussion can be led by the Chair or by an independent third party. Areas to evaluate include, but are not limited to:

- Policy development and strategic planning
- Member satisfaction
- Program success in view of current member needs and expectations
- Relationships with other associations, alliances, etc.
- Board and committee performance
- Performance of the executive director
- Meeting financial and other promotional targets

Individual Member Evaluation

The board Chair can also evaluate board members and this is best done in person. Consider this criteria:

- Contributions to the discussion at meetings
- Attendance at meetings
- Ability to recruit new members to the association and the board of directors
- Knowledge of the association
- Currency with respect to trends that affect the association
- Ability and willingness to undertake committee work or special assignments
- Maintenance of confidentiality
- Ability to serve the organization as a whole, not a particular constituency
- Disclosure of potential conflicts of interest
- Exercise of prudence with respect to the resources of the organization

See Appendix B and C for Sample Evaluation Forms.

Did You Know?

“Supporting and evaluating volunteers provides numerous opportunities to say THANK YOU in a meaningful way.”

High-Performance Associations Have a Mission Statement, Goals and Strategies.

A mission statement identifies who the organization serves, and outlines its fundamental purpose and scope.

Goals are the activities that help fulfill the mission statement. They are specific, quantifiable and executed into support of the mission statements. They are NOT nice-to-dos, but need-to-dos to keep the association moving forward. For example:

- Increasing membership by 15% annually
- Delivering four educational opportunities annually
- Educating the local public on the benefits of dealing with members through a monthly press release

Strategies set out how particular goals are going to be accomplished.

A governance model dictates the chain of authority. Typically, the board of directors appoints committee Chairs who, in turn, report back to the board. Each committee Chair takes their direction for what they are to accomplish from that plan. Volunteers, under the direction of the Chair, work towards the goals that have been identified.



OCLD's Mission Statement

“To train and develop strong leaders in the not-for-profit sector.”

The Board of Directors

The work of the board is completed through a committee process, led by a board of directors. In addition to being volunteers, the directors have additional responsibilities for the safekeeping of the organization as a whole. Responsible at a strategic level for the success of the organization, research offers these tell-tale signs of a productive, effective board. Which statements apply and which ones present areas for potential improvement?

Does the Board of Directors:

- Understand the important role that strategic planning plays in achieving results?
- Help the association move forward
- Keep the association focused
- Helps communicate its purpose to the membership
- Attracts volunteers
- Helps allocate resources
- Inspires a TEAM approach
- Know who their customers are and listen to them?
- Understand the nature and impact of change?
- Recognize the natural decline in volunteerism and re-define the volunteer's role?
- Focus globally rather than inwardly?
- Take a business like approach to running the association?

Individual Directors Contribute

Since a board of directors is a composite of individual volunteers who have been elected to the role of director, the effectiveness of those individuals is also critical to the effectiveness of the board as a whole. Board members are required and expected to:

- Hold high standards of care for the organization
- Be subject to common law obligations
- Act honestly and in good faith
- Be loyal to and act in the best interest of the organization
- Avoid personal conflicts of interest with the organization
- Prevail over acts that are permitted by the organization's bylaws
- Be visionary
- Set policies for the organization
- Contribute to the effectiveness of the board
- Attend and participate in meetings
- Develop and support the organization's mission and strategic plan
- Help recruit new volunteer leaders
- Stay current on issues and trends
- Support the executive director
- Assess the performance of the executive director
- Monitor investment policies
- Oversee and support planning and financial adherence
- Enhance the public image of the organization
- Maintain accountability
- Fulfill legal obligations of the organization

Pam Varil-Therrien

She was very impressed by the caliber of volunteers she met. From them she learned a lot of useful knowledge about the industry, the marketplace and new ways to approach business. Pam highly recommends getting involved because, "it helps you to grow – to stay in the loop of what issues are facing our profession."

A Volunteer and Staff Partnership

Effective association management calls for a partnership between volunteers and staff. The nature of the partnership varies from association to association. Volunteers and staff must share a commitment to the mission and goals of the organization and continuously pursue the best interests of the association and the members it serves.

Conflict between volunteers and paid employees most often result from a lack of understanding of the responsibilities, authorities and accountabilities that fall to each party.

Although this model varies tremendously from association to association, most committee decisions go through these steps with the staff and board responsible for specific parts of the equation. If this is not the model at your association, it is important to make sure that you do have a clear distribution of duties.

Step 1	Gathering information, preparing options and recommendations	Staff	
Step 2	Discussion	Staff	Board
Step 3	Decision through voting		Board
Step 4	Implementation	Staff	
Step 5	Monitoring		Board

A solid understanding of who is responsible for the planning, execution and implementation of the organization's strategic vision is important for good governance. The role of directors and staff can be confusing in theory and, if not properly managed, damaging to the board's effectiveness.

Effective boards normally lay some groundwork to establish professional practices for committees and staff. Review the following list of roles to determine which area has been covered at your association and which presents an opportunity for improvement.

Volunteer and Staff Responsibilities

Board of Directors

- Implement and document a governance process
- Establish job descriptions for board of directors, board Chair and members
- Establish job description for the senior paid staff
- Adhere to governance model and job descriptions

Board and Staff

- Collaborate on strategic initiatives to gain from diverse perspectives
- Ensure the organization's mission is top of mind in decision-making process
- Promote efficient and effective use of volunteer and paid resources
- Listen to each other and respect differing points of view

Senior Staff

- Provide the board with information on governance
- Provide the board with information on trends, demographics and policy to keep them focused on the big picture
- Offer effective management and advice to the board
- Establish job descriptions for all employees
- Provide mechanisms to recruit, train, retain and recognize volunteers
- Be open, honest and straightforward in all communication

The volunteer work of the board is most often conducted through regularly scheduled meetings where effective chairing, preparing, participation and follow-up are the keys to success.

The Role of the Chair

At the heart of all committees is an effective Chair. Often the volunteer with the most experience, the Chair has to use his or her experience to get valued contributions from the group as a whole and keep the process moving forward. The effective Chair:

- Knows the organization well
- Facilitates rather than dictates
- Reviews the agenda carefully prior to it being distributed to members
- Arrives early and prepared
- Starts on time and ends on time
- Encourages all members to participate
- Restates opinions and summarizes frequently
- Keeps the meeting focused on the goals of the meeting
- Keeps control of the meeting and the order of speakers
- Delegates tasks
- Maintains decorum
- Recognizes efforts with appreciation
- Knows when to close the debate
- Summarizes the meeting accomplishments at the close
- Ensures follow-up is done



Volunteers lose interest if they believe discussions are railroaded or that their opinions are not welcomed or valued. A good Chair facilitates adequate discussion, draws out those who have not yet expressed their thoughts, and knows when to draw a discussion to a close.

Consider discussing this list at your first meeting. After discussion, approve the list to confirm a full and equal commitment from all volunteers.

The Effective Volunteer

Volunteers often show strong enthusiasm in their initial meeting. However, they may require additional structure to keep their participation, and the committee's work, on track. The effective volunteer:

- Arrives at meetings prepared to participate
- Comes to meetings prepared to report on their progress
- Listens to everyone who is speaking and doesn't interrupt
- Participates in discussions where they can contribute their experience and knowledge
- Meets to work to the benefit of the organization, rather than for personal gain
- Agrees to support and encourage everyone, and say thank you
- Remembers that they represent all members
- Doesn't defend motions and speaks once on a motion, through the Chair
- Doesn't participate in side discussions or parking-lot meetings
- Disagrees with ideas, not people
- Remembers that the accepted motion is the WILL of the committee

Scheduling Meeting

Verify proposed meeting dates with key committee members and staff who should be in attendance. E-mail is a great way to whittle down prospective meeting dates to one that works for a majority of members. Agreeing to a schedule for the year is also an effective technique.

Setting the Agenda

The agenda and related information should be sent to volunteers ahead of time so they can review it and arrive at the meeting well prepared to contribute. All materials should arrive five days before the meeting itself and the agenda should include the following:

1. Name of meeting
2. Name of Chair
3. Date, start and end time, location
4. Approval of agenda
5. Approval of the minutes of the last meeting
6. Business arising from the last meeting
7. New and other business
8. Date and location of next meeting
9. Adjournment

FACT NOT FICTION

Betty (not her real name) volunteered to sit on an important association committee. In isolation, the Chair established a regular monthly meeting date that worked to his personal benefit. That date was unworkable for Betty. As a consequence, Betty was unable to attend most meetings and felt as if her contributions weren't really wanted. She ultimately resigned. This is a good example of a lose-lose situation – the association lost an enthusiastic volunteer and Betty lost the desire to ever volunteer again.

Include the name of the volunteer who will open the discussion on each item, along with the time allotted. Remember to schedule adequate time for discussion of key agenda items.

Use action words in the agenda to describe what is required; for example, approval of, acceptance of, review of, report on, discussion on, decision to, etc.

See Appendix D for a Sample Agenda.

Volunteers don't appreciate attending a meeting simply for the sake of holding a meeting. Every agenda must be substantial enough to honour the commitment of time each committee member must make to attend. Do not waste their time.

Taking Minutes

Minutes record the decisions taken and should briefly outline the discussion that led to each decision.

- Minutes are a legal record of the meetings
- They are not a record of side conversations
- No audio recordings should be maintained once the minutes are approved
- Minutes are to be approved at the next convened meeting

The minute taker should distribute completed minutes within five working days of each meeting so participants will receive them when discussion is still fresh in their minds. Corrections should be discussed at the next meeting of the group, and amendments made as required. Keep a copy of amended and approved minutes permanently on file at the association.

See Appendix E for a Sample of Minutes.

Getting Action

It is very helpful to provide a separate, action-item grid to follow assignments from one meeting to the next. Identify what steps need to be taken, by when and by whom.

The Chair is responsible for following up, however, some do delegate this work to a staff member. The Chair should ensure that everyone gets a call a week before the meeting to confirm that they have done the work they agreed to do at the last meeting.

See Appendix F for a sample of an Action-Item Grid.

Volunteers get discouraged when they arrive at a meeting only to learn that actions agreed upon were not taken. The Chair should constantly reinforce the need to honour commitments to the group. The Chair should also lead by example.

Reward • Appreciate • Recognize

Volunteers are motivated by much the same things that motivate all of us: praise, affiliation, accomplishment, power and influence.

As you develop your own recognition program, consider these 10 guidelines to recognize your volunteers.

1. Give it or else
2. Give it frequently
3. Give it via a variety of methods
4. Give it honestly
5. Give it to the person, not to the work
6. Give it appropriately to the achievement
7. Give it consistently
8. Give it on a timely basis
9. Give it in an individualized fashion
10. Give it for what you want more of



Thanks Comes in Many Forms

There are many ways to provide deserved recognition. Which of the following would work at your association?

- Physically create a Volunteer Hall of Fame in the association office, and virtually on the website
- Introduce an Outstanding Service Award (Volunteer of the Year)
- Provide complimentary education event opportunities
- Give volunteers passes to a museum or a local entertainment venue for themselves and their families
- Hold one-on-one meetings with key volunteers to discuss their ideas and express your thanks
- Recognize volunteers in front of their peers at a general membership meeting
- Hold a volunteer appreciation luncheon
- Provide framed volunteer appreciation certificates or plaques
- Pay for their conference registration
- Provide each volunteer with a volunteer pin
- List names of all volunteers annually in a newsletter
- Moral support is another great motivator - a quick phone call to say thank you and extend congratulations is always welcomed

Barb Begolo

“Volunteering gives you the opportunity to meet many different people. You will forge new friendships, increase your knowledge and grow your business referral network – an unexpected benefit.”

Avoid These Pitfalls

A well-run, well-thought-out recognition program will reap rewards for all current volunteers and increase your ability to recruit volunteers. Avoid these surefire ways to annoy or even potentially insult volunteers rather than recognize them:

- Base rewards on what the managers value rather than what the volunteers value
- Assume certain rewards to be good for everyone without regard for individuality
- Administer inconsistently
- No meaningful connection to the work or individual
- Offer rewards whether performance merits it or not
- Assume that the association's mission is sufficient justification to volunteers with no recognition or celebration of the volunteers' work
- Offer excessive recognition and celebration

Remember to say thank you to your volunteers. Say it often. Say it publicly. Say it with sincerity.

It is important to make volunteering a rewarding and positive learning experience. When a volunteer has provided good service, reward them by offering a new and different challenge.

Some members just keep on giving! While you do not want to lose such valuable volunteers, it is just as important to bring in fresh faces. At the committee level, it may be beneficial to have set terms of service such as a one-year term with the option of two one-year renewals.

Organizations that tolerate the "old guard" dissuade uninvolved members from coming forward with new ideas and talents. Constantly keep an eye on your volunteer mix.

Accomplishment in your profession attests to your ability to make a meaningful contribution. So does volunteer experience with other organizations unrelated to your profession.

Nominating Committee

Appendix A

Purpose:

To prepare a slate of directors to serve on the board in accordance with bylaw 3.2.2 and submit that slate to the board of directors in accordance with bylaw 3.3.2.

Accountability:

The Nominating Committee reports to the board of directors.

Responsibilities:

The Nominating Committee shall invite nominations from the membership to serve on the board in accordance with bylaw 3.2.1.

The Nominating Committee shall ensure that the proposed slate of directors reflects the regional and practical diversity of the membership.

Committee Composition:

The Chair of the Nominating Committee shall be a board member appointed by the board. Members of the committee will include: two past presidents, two non-board members and the executive director (ex-officio).

Term of Office:

Members and the Chair shall serve a two-year term, renewal for one additional two-year period.

Frequency of Meetings:

The Nominating Committee shall hold a minimum of three meetings (in person or by teleconference) to fulfill their responsibilities as outlined in bylaw 3.2.2.

Name of Staff Liaison:

The staff liaison to the Nominating Committee shall be the executive director.

Appendix B

Part A: Completed by Committee Chair

Name: _____

Position: _____

Period of Evaluation: _____

Total # of cases handled or hours contributed: _____

Committee Chair: _____

Rating Scale:

1	2	3	4	5	N/A
needs improvement	fair	good	very good	superior	not applicable

I. Professionalism

- _____ Understands purposes and goals of the organization
- _____ Understands and complies with confidentiality in client relationships
- _____ Relates well with public, staff and fellow volunteers
- _____ Exhibits poise in handling difficult situations
- _____ Exhibits sincere interest and enthusiasm towards clients and work

Comments:

II. Responsibility

- _____ Reliable about schedule and time commitment
- _____ Completes assignments in a timely fashion
- _____ Pays attention to detail when necessary
- _____ Willing to take on assignments

Comments:

III. Effectiveness

- Welcomes opportunities to learn information or procedures that will make work more effective
- Follows through on assignments
- Willing to ask questions when in doubt
- Uncovers and communicates all pertinent facts

Comments:

Benefits to staff from working with this volunteer:

Benefits to organization from this volunteer's skills, experience and knowledge:

Additional Comments:

Signature of Chair:

Date:

Signature of Volunteer:

Date Reviewed:

Appendix C

Name: _____

Position: _____

Period of Evaluation: _____

Rating Scale:

1	2	3	4	5	N/A
needs improvement	fair	good	very good	superior	not applicable

I. Orientation and Training

_____ The goals and purposes of the organization were clearly explained

_____ The job description for your position was reviewed and procedures to be followed were explained

_____ Training was effective and provided the tools needed to perform the assigned tasks

Comments:

II. Committee Chair

_____ Chair was available to you when you had questions or needed information

_____ Chair's attitude was one of professional regard

_____ Chair had a progressive agenda for the organization

Comments:

Please respond to the following questions:

What other training or growth opportunities would you like to see offered?

What additional tools would make your work more effective and/or pleasant?

What are some suggestions or goals you would offer for the volunteer program?

How could the association improve its volunteer-staff structure and/or relationships?

Appendix D



Finance Committee Meeting Agenda
Monday, November 15, 2010
9:00 a.m. – 11:30 a.m.
Association Office
416.442.3400

Chair: Terry French

1. Welcome
2. Approval of agenda
3. Adoption of minutes of the last meeting, held August 16, 2010
4. Business arising from the last minutes:
 - a. Outcome of request for proposal for new financial management software (EO)
 - b. Board decision re committee recommendation to move \$25,000 GIC into current account

(Chair)

5. Discussion of current issues:
 - a. Review of investment policy
 - b. Recommendation to board to increase cash flow in Q2
6. New and other business
7. Date and location of next meeting: February 14, 2011 9:00 – 11:30 a.m. at association office proposed
8. Adjournment: 11:30 a.m.

**Minutes of the Communication Committee
Held June 20, 2010
Association Office**

Present:

Chris English, Chair
 Mickey Doland, West End Real Estate
 Pat Murphy, East End Real Estate
 Dale Taylor, Fast Sale Real Estate
 Terry Wloshinsky, Friendly Commercial Real Estate Brokers
 Ro Wan, OREA Director of Communication

Regrets:

Sandi Late, 24/7 Real Estate

Key:

M/S/C = Moved, Seconded and Carried

		Action
04.15.1	<p>Welcome</p> <p>Chair Chris English welcomed everyone at 9:30 a.m. and called for self-introductions. A special welcome was extended to new committee member Dale Taylor.</p>	
04.15.2	<p>Approval of Agenda</p> <p>The Chair invited a motion to approve the agenda circulated by e-mail June 10, 2010. Terry Wloshinsky asked to add a discussion about the recent article in the North Bay Times under new/other business.</p>	
04.15.3	<p>Approval of the Minutes of the Last Meeting</p> <p>Mickey Doland noted that minutes of the last meeting held March 22, 2010 omitted to list his name as a participant. M/S/C Murphy/Wloshinsky that the minutes of the March 23, 2010 meeting be adopted as amended.</p>	

04.15.4	<p>Business arising from the last minutes:</p> <p>Board feedback to Communication Plan 2011</p> <p>The Chair reported that the board was very pleased with the proposed 2011 Communication Plan. They would like to see more emphasis placed on enhancing the REALTOR® image in the community.</p> <p>After a full discussion, the committee agreed to divert \$5,000 from the Member Program Promotion budget to the Community Project. These redirected funds will also enable the association to place existing ads in the three 2010 festival literature. Dale Taylor agreed to make those arrangements.</p>	Dale Taylor to place ads in the three festival promotional pieces
04.15.5	<p>Communication Plan 2011 Execution</p> <p>The Chair invited the members to discuss any concerns they might have about their ability to execute the 2011 Communication Plan.</p> <p>Terry Wloshinsky indicated that while plans and resources have been allocated to recruit new volunteers, OREA's new handbook might address that need. Terry agreed to review the handbook in detail and report to the next meeting.</p> <p>Pat Murphy confirmed that Bill Shepherd has agreed to speak at the New Members Orientation Reception on August 11, 2010 to be held at the Board of Trade.</p>	
04.15.6	<p>New/Other Business</p> <p>New Committee Member</p> <p>Mickey Doland reported that further to a previous discussion where it was felt the committee would benefit from adding a member with journalism experience. She has identified August Simpson as a candidate.</p>	
04.15.7	<p>Date and Location of Next Meeting</p> <p>The committee agreed to meet on Thursday July 22, 2010 at Association office from 9:30 a.m. – 11:30 a.m.</p>	

Chris English, Chair

Date

Ro Wan, Recording Secretary

Date

Activity	Assigned To	Budget Item	Due Date	Done
1. Draft policy wording on use of website for posting information on golf tournaments	Communication Chair	n/a	Aug. 14/10	Done
2. Research free promotional opportunities in the community for REALTOR® image material	Sandy Late	n/a	Sept. 3/10	
3. Send out registration materials for August Lunch & Learn event	Ro Wan (staff) Paule Tuft (member to approve final copy)	7.3.8 – maximum \$300.00	Jul. 6/10	
4. Invite executive director to AGM Dec 8, 2010	Chair	n/a	Jul. 14/10	
5. Schedule Volunteer Appreciation Event with AGM	Special Events Chair	9.6 – maximum \$750	Jun. 29/10	

American Society of Association Executives

www.asaenet.org

Canadian Society of Association Executives

www.csae.ca

Charity Village

www.charityvillage.com

Ontario Real Estate Association

www.orea.com

Solution Studio Inc.

www.solutionstudioinc.com

Volunteer Canada

www.volunteer.ca