Volunteer Kentucky!
Lesson Plan
Session #2: Generate
Generating, Educating, Mobilizing and Sustaining

Learning Objectives:
The participants will:
- *differentiate* the roles of members and participants in community organizations
- *define* the differences between volunteers and leaders in community organizations
- *examine* the needs assessment process that directs successful recruitment of members, volunteers or leaders necessary for achieving the organization's mission
- *develop* needs-based roles and responsibilities, position descriptions will be utilized to successfully recruit and fill roles in the organization
- *employ* an effective member, participant, volunteer and leader recruitment plan that is necessary for achieving organizational goals and objectives
- *examine* and follow volunteer selection and screening practices when filling organizational roles

Resources:
- GEMS Model of Volunteer Administration http://www2.ca.uky.edu/agc/pubs/CLD2/CLD23/CLD23.pdf
- KELD Publication Series http://www2.ca.uky.edu/kccl/keld.php
- VRKC Taxonomy http://nextgeneration.4-h.org/volunteerism/vrkc/
- National Framework for 4-H Volunteerism Assessment http://www.uwex.edu/ces/4h/ncrvd/ref/NLPVolunteerism.cfm
- Volunteerism for the Next Generation http://www.4-h.org/resource-library/professional-development-learning/4-h-volunteer-development/

Session Goal:
To examine organizational processes leading to successful participant recruitment and the fulfillment of mutually satisfying community service goals.

Pre-Program Preparation / Materials:
- Kentucky Passport and stamp for passport for each participant (from Session #1)
- KY License Plate participant name table tents (from Session #1)
- Flip Chart paper and markers
- Secure laptop computer, projector and wireless access
- Prepare copies of CLD2-4 *Generating Members, Volunteers and Leaders in Community Organizations: Grow Your Group by Building Its Membership* for participants. http://www2.ca.uky.edu/agc/pubs/CLD2/CLD24/CLD24.pdf

Session Goal:

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Cooperative Extension Service | Agriculture and Natural Resources | Family and Consumer Sciences | 4-H Youth Development | Community and Economic Development

1 *Volunteer Kentucky!* materials developed by Ken Culp, III, Ph.D., Mary S. Averbeck, M.A., Joyce Doyle, M.A., Diane Kelley, M.S. & Lora Stewart, B.S. (2015). University of Kentucky Volunteer Administration Academy. ken.culp@uky.edu

- Duplicate CLD 2-5 *Using a SWOT Analysis: Taking a look at your organization* for participants. http://www2.ca.uky.edu/agc/pubs/CLD2/CLD25/CLD25.pdf
- Duplicate CLD 2-5-FCS *Using a SWOT Analysis* for participants. http://www2.ca.uky.edu/agc/pubs/CLD2/CLD25-FCS/CLD25-FCS.pdf
- Download PowerPoint Presentation *Volunteer Kentucky! Generating Members, Volunteers and Leaders*
- Prepare copies of participant activity handouts and activity cards:
  - *Needs Assessment Discussion Guide* example handout for Learning Activity 3.2
  - *Volunteer Position Description Component Cards* handout for Learning Activity 4.2
  - *Volunteer Position Description Sample* handout for Learning Activity 4.2
  - *Mayberry Community Board Council President's Position Description* handout – Learning Activity 4.2
  - *Eleven Tips as a Foundation for a Successful Recruitment Plan Eleven Tips as a Foundation for a Successful Recruitment Plan* – Learning Activity 5.1
  - *Mayberry Community Board Council Member Interest Survey* example handout - Learning Activity 6.1

Review from Previous Session:

Discuss   Ask participants to share the results from the previous session's homework assignment.
- Each participant should bring the tools and marketing materials utilized when recruiting new volunteers to serve their organization. (These will be used to create a Volunteer Recruitment Packet for their organization).

Background:

Share   Read the following excerpt:

"Successful organizations consist of people who serve the community by engaging their creative talents and interests to serve the organization as well as the community. Effective organizations are composed of a variety of members, volunteers and leaders. The collective interests, skills and abilities of these individuals can be called to action in order to fulfill identified community needs and assist or serve specific clientele, audiences or populations. But what type of participant does your organization really need?"

PowerPoint Presentation:

Present   Facilitator will share the PowerPoint Presentation *Volunteer Kentucky! Generating Members, Volunteers and Leaders.*

Distribute   Hand out Fact Sheet CLD2-3 *Strengthening Organizational Leadership with the GEMS Model of Volunteer Administration.*

Objective #1: Differentiate the roles of members and participants in the community organizations.

Successful organizations consist of people who serve the community by engaging their creative talents and interests to serve the organization as well as the community.

Opener   Pose the following discussion question:
"*What is the difference between people who belong to an organization and those who are engaged in the organization?*"

Ask   Facilitate discussion with participants responding with different ideas in order to introduce the concept of differences in current and future roles in the organization.

"*Not all program participants are actually members. For example, a person who joins or belongs to an organization is a member. A person who is engaged in the organization without being a member is a participant.*"

Pose the following group question for discussion:
"*Can a person be a participant or a member of an organization and not be a volunteer or a leader of that organization?*"

Ask individuals to share their thoughts and ideas about the previous question.

Respond Reply by reading the following:

"*Many organizations talk about recruiting new members or holding a membership campaign. However, the organization should first consider whether its greatest needs are members, volunteers or leaders. Additionally, what benefits does the organization provide to members, volunteers and leaders?*"

"*Understanding the differences between members versus participants and volunteers versus leaders as well as what type of individual is needed to accomplish the goals of the organization is the first step toward a successful recruitment campaign.*"

Effective organizations are composed of a variety of members, volunteers and leaders.

Objective #2:   Define the differences between volunteers and leaders in community organizations.

Learning Activity 2.1:

Share   Read the following excerpt:

"*Not every member of an organization actually becomes a volunteer. Volunteering requires active participation and involvement. It is possible to be a member of an organization without contributing time, talents or service to it. Likewise, not all volunteers become leaders. A leader is an individual who shares leadership skills with a group. An important component of leadership is a group of followers. For example, individuals who are actively involved in an organization but do not assume a leadership position contribute to that organization as volunteers.*"

"All four groups—members, participants, volunteers and leaders--have important roles in the organization and are dependent upon each other to complete their role. However, organizations may have different needs."

"Organizations wanting to expand their outreach in the community need program participants. For those organizations that simply need to build support or funding capacity, recruiting dues-paying members may be the priority. For member-rich organizations, or those whose goals, programs, projects or activities require additional input or service, volunteer recruitment should be the focus. An established organization may find that building its leadership base is the most important need. This is especially critical for identifying goals or building relationships with community stakeholders and elected officials.

Learning Activity 2.2:

Ask   Pose the following question for group responses:
"What roles do the following participants have in their organization: member, participant, volunteer or leader?"

- *Emilio attends monthly club meetings and participates in club activities (member & participant)*
- *Chastity attends monthly club meetings; serves on the fund-raising committee, registers exhibits at the community festival (member, participant & volunteer)*
- *Tom attends monthly club meetings; serves an officer (member, participant & leader)*
- *Felicia participates in some activities sponsored by the organization (participant)*
- *Stan serves on the Board of Directors; serves as chair of the Fundraising Committee; and attends most meetings of the organization (member, participant, volunteer & leader)*

Objective #3: Examine the needs assessment process that directs successful recruitment of members, participants, volunteers or leaders necessary for achieving the organization's mission.

Learning Activity 3.1:

Share   Read the following excerpt:

"A needs assessment provides a "big picture" look at the organization and its programs. Assessing needs determines what tasks should be performed in order to accomplish the goals of the organization. Clarify the vague idea of "we need more volunteers in order to get things done" into a concrete statement."

"A needs assessment is conducted by assembling a group of individuals representing different groups and segments of the community, and soliciting their input and advice about a specific problem, issue, need or concern. Once identified, these problems, issues, needs or concerns

The collective interests, skills and abilities of these individuals can be called to action in order to fulfill identified community needs and assist or serve specific clientele, audiences or populations.

become a basis for programming, based upon the mission of the community organization. In other words, after having identified these problems, issues, needs and concerns, the group then determines "How will our organization respond and what do we hope to accomplish through the efforts of members, participants, volunteers and leaders?" Which type of individuals do we need to accomplish the goals of the organization?"

Distribute   Hand out the Fact Sheet CLD2-3 *Strengthening Organizational Leadership with the GEMS Model of Volunteer Administration.*

Learning Activity 3.2:

Discuss   Using the CLD 2-5-FCS Fact Sheet, explain the Needs Assessment process using a SWOT Profile. Define Strengths, Weaknesses, Opportunities and Threats for the group, using the definitions in the Fact Sheet (CLD 2-5). Differentiate between internal (Strengths and Weaknesses) and external (Opportunities and Threats) factors. Ask the group to give examples of Strengths, Weaknesses, Opportunities and Threats of their own organizations.

Distribute   Hand out the *Organizational Needs Assessment Discussion Guide* sample to the group. Read the scenario to group: *The Mayberry Community Board meets to discuss community issues, in preparation for developing their five-year plan. The Board collectively agrees on a specific issue that is important to the community*.

Learning Activity 3.3:

Discuss   Ask members of the group to consider and answer the following questions:
- *What was the most significant community issue identified by the Board?*
- *Does addressing this community issue fit within the mission of the organization?*
- *How does the organization choose to respond to this issue?*
- *What are the organization's primary recruitment needs: members, participants, leaders or volunteers?*
- *In order to address this community issue, what are the greatest needs of the organization: members, participants, volunteers or leaders?*

Objective #4: Develop needs-based roles and responsibilities, position descriptions will be utilized to successfully recruit and fill roles in the organization.

Learning Activity 4.1:

Share   Read the following excerpt:

"The very essence of leadership is its purpose. The purpose of leadership is to accomplish a task. That is what leadership does—and

Volunteering requires active participation and involvement.

what it does is more important than what it is or how it works." ~ Colonel Dandridge M. Malone

"A good leader understands what is expected in order to accomplish a purpose!"

"In order to recruit volunteers and leaders to accomplish organizational goals and to recruit the best person for the task, the duties, role and responsibilities of each leadership position should be articulated in a written volunteer position description. Volunteer position descriptions include a written explanation of the position and role and constitute an agreement between the individual and the staff member or other organizational leader. Position descriptions help everyone, including both potential and current volunteers as well as the volunteer administrator, understand their duties, responsibilities, and the expectations of the position. People who do not understand what is expected of them will not volunteer, experience success or have a positive experience."

Learning Activity 4.2:

Distribute | Hand out the *Position Description component cards* to participants randomly. Also, give each participant the *volunteer description sample* and *Mayberry Community Board President's Position Description*.

Ask | Encourage participants to 'shout' out components in the correct order. After each component, ask group to look at *Roles & Responsibilities for Mayberry Community Board President* and provide the required information from the example for each component. Create a list for the group on the large flip chart.

Example:
Facilitator: *"What's the first component of a volunteer position description?"*
Participant: *(with the position title card)* shouts "Position Title!"
Facilitator: *"What is this on our example?"*
Answer: Mayberry Community Board President

Ask | Pose the following question for group responses:
- *Where would you find the information to include under the specific position components?* (Board by-laws, standing rules, etc.)
- *How do listings of specific roles and responsibilities help with recruiting new volunteers or leaders to the organization?*
- *How will using this tool better enable the organization to accomplish its goals?*

Objective #5: Employ an effective member, participant, volunteer and leader recruitment plan that is necessary for achieving organizational goals and objectives.

All four groups— members, participants, volunteers and leaders--have important roles in the organization and are dependent upon each other to complete their role.

Learning Activity 5.1:

Share   Read the following excerpt:

"Now that you know what type of participant you may need to accomplish the goals of your organization, how do you identify the specific people that should be targeted for volunteer recruitment? How will you develop a recruitment plan based on the member, type of volunteer or leadership your organization needs?" Distribute the *Identify Potential Volunteers* and *Eleven Tips* handouts.

Ask   Participants should complete the *Identify Volunteer Resources* handout by making an inventory of people in the community who could be potential volunteers for their organization and its programs.

At the conclusion of the Overview Session, participants were asked to bring the tools and marketing materials that they utilize when recruiting new volunteers to the next meeting. Share and refine these tools and ask them to develop a *Volunteer Recruitment Packet*. The packet should include the following items:
- Volunteer Application
- Volunteer Position Description
- Organizational Brochures
- Information about the organization and its programs
- Business card of the volunteer administrator

Review   Refer to the *Eleven Tips as a Foundation for a Successful Recruitment Plan* and *Mayberry Community Board Council Member Interest Survey* handouts listed below:
1) *Conduct an organizational needs assessment. Identify the specific tasks that need to be done in order to fulfill the needs of the group or organization.*
2) *Define the task* (through a needs assessment) *and role* (defined in a position description).
3) *Market your organization and its volunteer opportunities throughout the community, using a variety of marketing strategies.*
4) *Look around and ask: "Who's not here?" then identify someone from an unrepresented group.* (Increases your volunteer pool)
5) *Recruit for skills, interests, or specific abilities rather than recruit specific individuals.*
6) *Begin with short-term, episodic* (a single episode) *involvement.* (Do not overwhelm new volunteers!)
7) *Appeal to the individual's own interests and motivation.* (Based on member interest surveys)
8) *Use a "wide angle lens" for volunteerism.* (Begin with the general purpose of the organization, then narrow the search as you learn more about the individual's own interests.)
9) *Send a member to recruit a member. Ask a volunteer to recruit a volunteer.*

An important component of leadership is a group of followers.

10) Make good use of people's time by asking them to serve the organization in meaningful ways.
11) Offer "perks," incentives and rewards as recognition for outstanding efforts.

Ask   Encourage the group to answer the following question:

How do we make sure the volunteer's or leader's time is well-spent? (Clear responsibilities outlined, clear meeting time/location schedules, clear project timeline.)

Objective #6: Examine and follow volunteer selection and screening practices when filling organizational roles.

Learning Activity 6.1:

Share   Read the following excerpt:

"Common screening processes for volunteer organizations that involve a specific screening protocol include completing an application, undergoing a criminal record check, sex-offender registry check, an interview and checking references. Generally, organizations whose clientele include children or at-risk audiences require the highest levels of screening. If projects or activities are a focus of your organization, it is helpful for the organization to ask each member to complete an interest inventory. The interest inventory is used to determine skills, interests and abilities that each person is willing to share."

"Members can be recruited with a membership campaign promoting the organization's mission, goals and appeal to personal interests. Current members can become volunteers through the use of an interest inventory, with these goals in mind:"
- *Identify the specific skills and interests that could be utilized in new volunteer role opportunities.*
- *Match special interests skills and abilities to specific volunteer roles available in the organization.*
"An interest inventory should be provided to new members and volunteers when they join and include sections for listing personal interests, as well as potential volunteer opportunities in the organization."

Ask   Have members/volunteers to complete an interest inventory. (For example, answers would include the individual's name, contact information, hobbies, work/career information, skills, talents and interests, specific checklist events, other volunteer interests, etc.)

Ask   Group members should consider and discuss this scenario exercise:

"You are the chair of the Mayberry Community Festival Concession Stand committee. A successful event requires many skills and talents as well as the participation of many individuals. You are handed Jennifer Smith's <u>Mayberry Community Board's Interest Inventory."</u>

People who do not understand what is expected of them will not volunteer, experience success or have a positive experience."

"How can you use Jennifer's information to help with volunteer needs? Should Jennifer be referred to other project activities other than the Concession Stand?"
(Examine Jennifer's *Interest Inventory*; ask members to generate ideas on projects, roles that she could be asked to participate in, based on her personal interest, skill set and talent information).

Ask   Pose the following questions:

"*Now that you have examined an interest survey, what types of items would you include on your organization's interest inventory?*"

"*Whose responsibility would it be to develop, distribute and utilize the information?*"

Learning Activity 6.2

Review   Share the following:

"The *Mayberry Community Board Needs Assessment Discussion Guide* results*. When the Mayberry Community Board met to discuss community issues, they determined that their greatest needs was the development of a community festival that would provide opportunities for citizens to showcase their talents, create a market for their products, strengthen their sense of community and increase tourism. How would they develop a volunteer recruitment plan for this event?*"

Discuss   Pose the following questions either by presenting the PowerPoint or by reading them to the group. Allow time for group responses.

- *"What tasks need to be performed for this event? What roles will be needed?"* (Examples: a committee chairman, volunteers for the event planning committee, event marketing chair, *"Who should recruit for volunteer roles?"* (The Volunteer Administrator or Mayberry Community Board members?)

Summary:

Share   Read the following excerpt:

"*In the next four sessions, you will learn how to apply the GEMS Model of Volunteer Administration in your organization. GEMS will provide the framework necessary to expand your volunteer program. You will also identify and complete a culminating project that will expand the volunteer program in your organization.*"

Session Evaluation:

Give each person an individual *GEMS Step Card*. Instruct them to arrange themselves in the correct order in which the steps appear in the GEMS Model. Determine how accurately the group has aligned the GEMS categories and steps and how well the group has retained the material by reviewing the four categories and 18 steps in the GEMS Model.

"A good leader understands what is expected in order to accomplish a purpose!"

For next session:

- Each participant should bring the tools and marketing materials utilized when recruiting new volunteers to serve their organization. (These will be used to create a Volunteer Recruitment Packet for their organization).
- Bring your Passport to each meeting in order to have credit given by the instructor.
- Distribute one copy of the **Volunteer Kentucky!** *Culminating Project* information sheet to each participant.

References:

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