

SUSTAINING THE VOLUNTEER EXPERIENCE: VOLUNTEER TRANSITIONS AND ONBOARDING

- Do you have an organized transition for new board members? What about committee members or your one-time volunteers? Let's iron out the information your volunteers need to be successful, elements of a successful board/officer transition, and why this is so important in sustaining the member and volunteer experience.

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Why Onboard?

Benefits

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- Faster adjustment
- Better job attitudes
- More customer referrals
- Better performance
- Higher board engagement
- Stronger board/volunteer retention

Benefits

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- ❑ Outlines and informs new board members of current initiatives and goals
- ❑ Informs people of who to contact for information or clarity on a given topic
- ❑ Allows new board members to catch on quickly
- ❑ Informing empowers
- ❑ Eases transition into new roles
- ❑ Provides existing board with affirmation that new board members are informed and prepared to engage

Onboarding

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- ❑ Key elements of a successful employee onboarding program
- ❑ Give everyone a role.
- ❑ Start with introductions.
- ❑ Instill company culture and values.
- ❑ Make the process personal.
- ❑ Follow a shadowing schedule.
- ❑ Teach the technology.
- ❑ Equip employees with valuable resources.
- ❑ Evaluate the process.

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The 5 C's of Onboarding

Adapted from Dr. Talya Bauer's The 5 C's of Employee Onboarding

5 C's of Onboarding

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- Compliance
- Clarification
- Confidence
- Connection
- Culture
- Check-back

Compliance

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- The mandatory onboarding tasks needed for all new board members
 - ▣ Sign any necessary agreements
 - ▣ Review of bylaws
 - ▣ Review job descriptions
 - ▣ Ensure access to email or common accounts
- **Current board responsibility:** Report new appointment to CEC HQ

Clarification

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- Clarification refers to how well new board members understand their roles and performance expectations
- Clarify
 - ▣ What they need to be doing
 - ▣ How they need to do it
 - ▣ How the organization functions (rules and policies)

Confidence

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- Refers to new board members' feelings about doing the job well and their competence to tackle new challenges
- Design onboarding experiences that help build up employees rather than tearing them down
- Prepare your board to actively support this

Connections

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- Refers to how accepted and valued new board members feel
- Research has consistently shown that a sense of connection leads to various positive individual and organizational outcomes
- Relationship building

Culture

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- Refers to how well new hires understand the organization's norms, values, stories, and symbols
- How/why the component was founded
- Sharing norms, missions, and goals
- Board meeting structures
- Member engagement
- Communication expectations

Check

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- Onboarding feedback
- Tracking trends in:
 - ▣ Performance
 - ▣ Understanding
 - ▣ Adapting to norms

Board Responsibilities

Preparing Your Board

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- Every board is in a different place when it comes to welcoming new volunteers, ideas and input
- It's easy to weaponize our experience and historical context when a new (or not-so-new) is shared
- Inform and empower
- Eating our young is real!

Preparing Your Board

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- Build up their plans, don't tear them down
 - Tried something before and it didn't work? Tell them why by providing historical context.
 - If you only tried it once, try again! Fix what went wrong before
 - “Yes and” can be empowering, “yes but” is not
 - Better to try and fail than to refuse growth due to perceived failure
- Promise to seek to understand
 - Why are they proposing this?
 - Who is their intended audience?
 - What is their intended impact?
 - How is this related to their scope of work? (If it's not, connect them to the right person to share their ideas with.)

The Board and Mentorship

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- With any new volunteer, it's important to keep in mind their potential pathway leadership.
 - ▣ We were all green at one time!
- Board leadership should turn over regularly – this keeps the component growing, sustainable and accessibility.
- Your board members should be prepared to coach and teach new volunteers. As you commit to “building your bench” your board must understand that a little extra TLC is necessary.

The Board and Mentorship

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- Terms and term limits should be in place
 - ▣ Best practice for all non-profits
 - ▣ Limits and changes in leadership is encouraging to aspiring leaders and current volunteers
- Coach and teach new volunteers – this is an additional role everyone needs to play into
- Communicate vision and goals of the board to new volunteers; use this as a guiding tool when redirection is necessary

Information your volunteers need to be successful

Component-Specific Info

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- Drive access
- Website
- Programs and offerings
- Membership insights
- Goals and/or strategic plan

CEC Info

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- Structure
 - ▣ Umbrellas of Units & Divisions
 - ▣ CEC staff contacts
 - ▣ Board
- Resources
 - ▣ How to access
 - ▣ Pulling reports

Recruitment Practices

Set yourself up for success!

Setting Everyone Up for Success

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- Board position descriptions & responsibilities are accessible for all
 - ▣ Include time commitments
- Pre-requisites are detailed
- Bylaws accessible
- Election timelines available
- Goal and strategic plan accessible

Best Practices

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- One-time and micro-volunteer roles
 - Encourages people to engage who might not otherwise consider larger roles
- Thank volunteers & highlight on social media
- See people engaging in communities or at events?
Tap them!
- Volunteer Square