

California Society of Association Executives



Spring Break!

Making Volunteer Involvement Rejuvenating and Rewarding



2009 Annual Conference
Aspire to New Heights
Wednesday, April 29 – Resort at Squaw Creek

Presented by: Steve Swafford, Balance Warrior
Washington, DC/Los Angeles/Eugene/Hartford/Boston
www.leadershipoutfitters.com



What Do Volunteer Leaders Want?

Expectations

- Time – Perceived vs. reality
- Resources – Who is doing the work?
- Success – Who wants to fail?
- Thanks – Ongoing encouragement



What Stops Them?

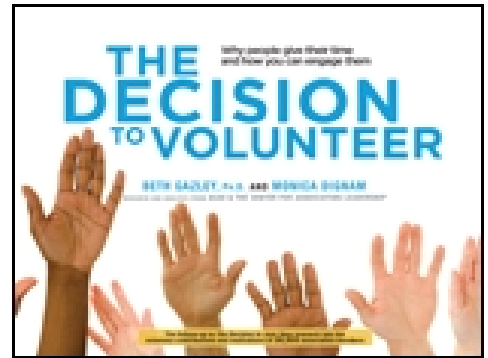
What Keeps Them?

All of the certificates of recognition we receive in life will fade. The monuments we build will crumble. The trophies will corrode. But what we do for others will make a lasting impact on our world. True success comes only when every generation continues to develop the next generation, teaching them the value and the method of developing the next group of leaders.

John Maxwell, *Developing the Leader Within You*

Just-Released!

*From the American Society of Association Executives
and the Center for Association Leadership*



Key Findings

Association members are highly engaged people

- High turnover in volunteers
- Many competing opportunities

Values drive volunteering choices

- Career/business benefits
- Care about things “bigger than themselves”

The “direct ask” holds real power

- Approach volunteers directly with meaningful tasks

Meaningful experiences keep them returning for more

- Want to be involved effectively
- Activities must be flexible and varied

Younger generations require special attention

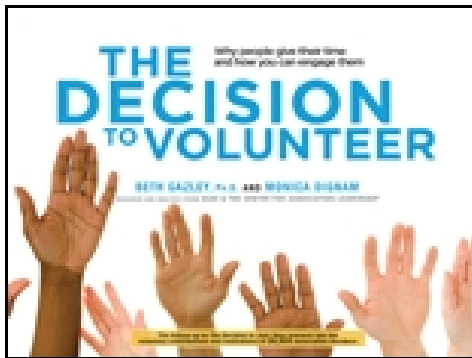
- Want meaningful and substantive experiences

Members recognize the professional benefits

- Many see volunteering as a benefit of membership
- See volunteering as something that has improved their professionalism

“Ad hoc” volunteers should be recognized

- Recognize ongoing committee work, mentoring, membership recruiting, writing, and other activities that might be off the “recognition” radar screen



Not All Volunteers Are Alike

Key Findings

Local Leaders (22.9%)

- Focused on local chapter board and committee service
- Mentoring, coaching, tutoring, and membership recruitment
- Two thirds at entry or mid-career levels of employment

Writers (26.7%)

- The “subject matter experts” of your organization:
 1. Presentations, expert panels
 2. Publishing
 3. Standards review

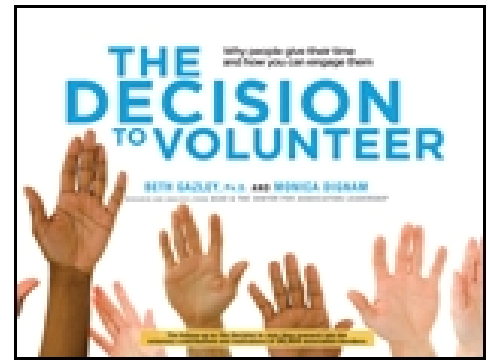
Teachers (32.8%)

- Mentoring, coaching, tutoring, professional advice and membership recruitment
- Contribute the fewest volunteer hours for the cosponsor organization
- Lower satisfaction levels

Shapers (17.6%)

- Engaged in every activity and perform the majority of volunteer work within the associations participating in this study.
 1. Mentoring
 2. Membership recruitment
 3. Local and national board and committee service
 4. Presentations
 5. Fund raising
- Older ages, longer membership span, more academic backgrounds, more senior career levels.
- Highest satisfaction levels

Why Do Members Begin Volunteering?



"I would start volunteering now if ..." (in rank order)

1. Meaningful opportunity
2. Right skills
3. Accessible location
4. Interest in volunteering
5. No loss of income
6. Short-term assignment
7. Information about volunteer opportunities
8. Training
9. Employer support



Keys To Involvement

- **Expectations**

- Time: How much time are you asking for?
- Ability: What are you asking them to do?
- Choice: WIIFM?

Volunteerism _____ based on the economy and issues.

45% of people who did not volunteer in 2003 cited the reason as "lack of time"

- **Success**

- Measures: Mission/What are you trying to do?
- Parameters: What is expected?

No one wants to _____.

- **Contribution**

- How much is enough? What does it mean to be a volunteer? How does it feel? Make it work for them.

Everyone brings _____ to the table.

- **Skills**

- What is needed?
- What do members offer?

We rarely _____ in a way that produces results.

2 in 5 volunteers had to ask to be involved

Word Bank:

Something

Fail

Ask

Fluctuates

Statistics from "Volunteering In The United States, 2004" Bureau of labor Statistics
<ftp://ftp.bls.gov/pub/news.release/volun.txt>



4 Basics of Getting New Members INVOLVED

1. Create a Positive First Impression

- Communicate upon receipt of application
- Send welcome kit as soon as membership is approved

2. New Member Orientations/President Receptions

- Keep it simple; make it creative; and time it right
- Personally invite the new members – notices are not enough
- Plan the agenda and the event
- Have them attend for a purpose – to pick something up, etc. .
- Develop handouts/kit/ mailing strategy
- Survey for interests
- Ask for involvement

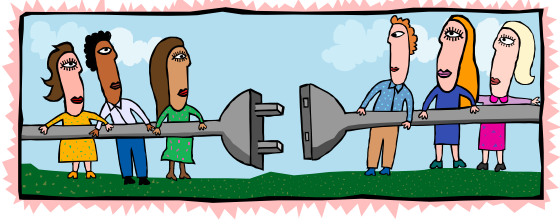
3. Treat New Members Like VIPs

- Publish new member names in publications
- Recognize at meetings
- Target communications to help them understand the organization

4. Proactive First-Year Strategy

- Assign a pal or buddy to each new member
- Emphasize recent association accomplishments in a personal letter from the association president
- Recognize new members in publications and at events
- Let members know their input is welcome
- Have special mailings to members that are “on the fence” about renewing
- Target limited resources to renewals that may not happen
- Ask for feedback - Before renewal time

Top 12 Reasons



Why Younger Members Don't Get Involved

1. **Bureaucracy and Red Tape**--Excessive or unnecessary barriers to getting involved; too many hoops to jump through to get ideas approved
2. **No Clear Vision: Lack of Focus**--Clear purpose/outcomes lacking for projects; how activities relate to organization goals not clear
3. **Not Fun**--Volunteer work seen as drudgery; committee work can be dry or too formal
4. **No End to the Commitment**--Projects, assignments or appointments with no 'end.'
5. **Not Open to Innovation and Creativity**--Only one acceptable way to accomplish something; no challenge; 'same old, same old'
6. **Bad Meetings or Bad Planning**--Lack of organization or poorly run meetings leading to few concrete results and unfulfilled expectations
7. **Patronizing Attitudes**--Judging others because of lack of tenure; not being acknowledged for what you can contribute
8. **Fear of Change**--Leaders who fear change or are averse to risk
9. **Lack of Appreciation**--Failure to provide feedback, recognition, acknowledgement
10. **No Sense of Community and Spirit**--'Old boys networks' or cliques; no sense of community which values diversity and inclusivity
11. **"Pay Your Dues" Mentality**--Outdated, long leadership tracks/ladders; few ways to make concrete contributions
12. **Talents Not Taken Advantage of: Perspectives Not Respected**--No interest in discovering individual talents or skills; lack of opportunities for individuals to use them

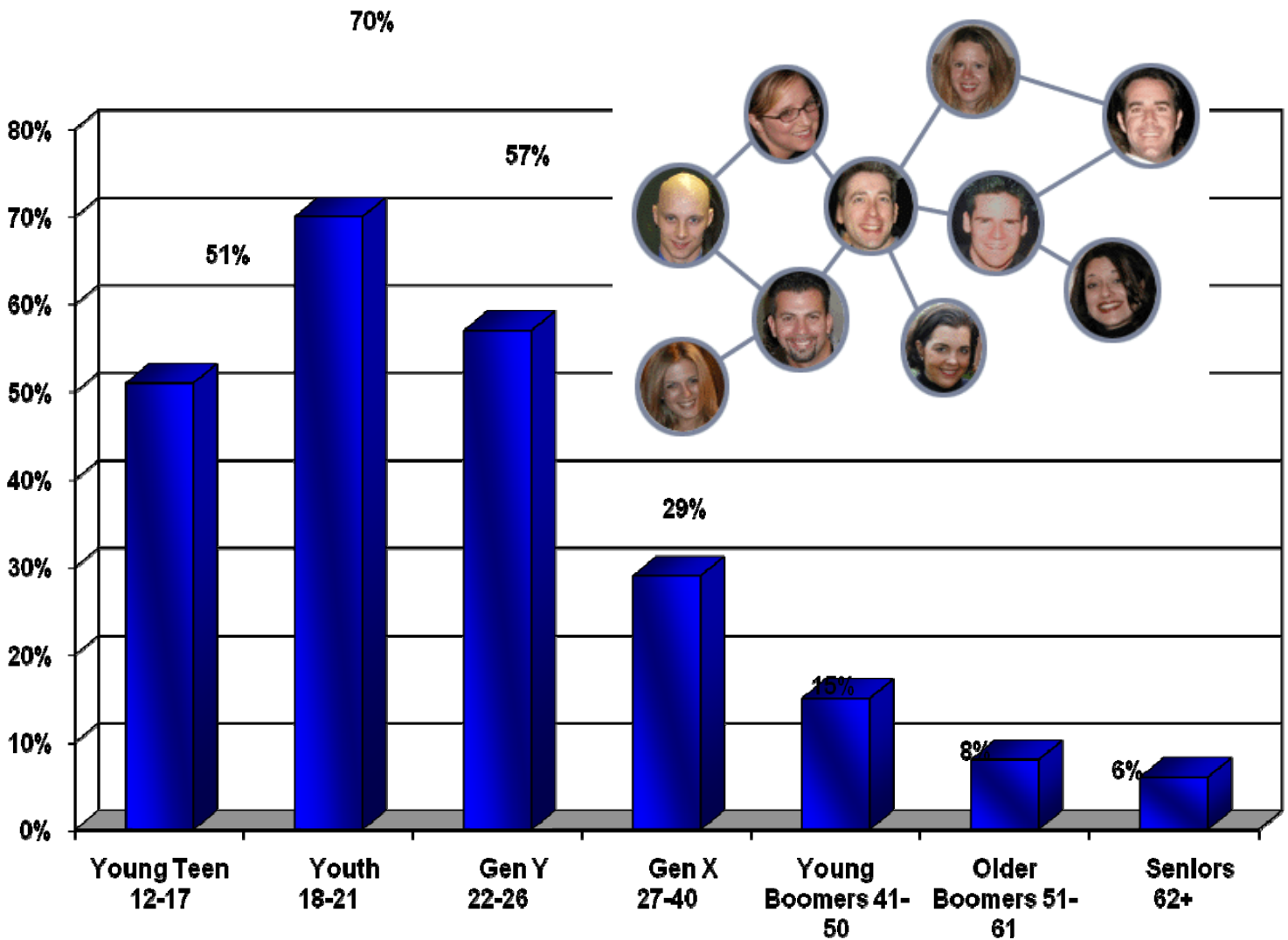
Adapted from "Cultivating New Leadership" by Jeffrey B. Cufaude, Association Management, ASAE, January 2000



Joiners

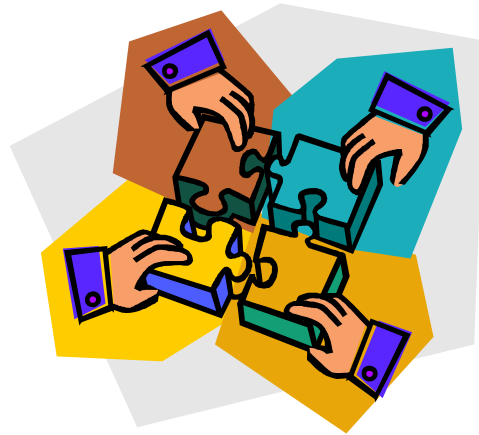


Use social networking sites



Source: *Business Week* Forrester Data June, 2007

Mindset



Mix

Mindset A:

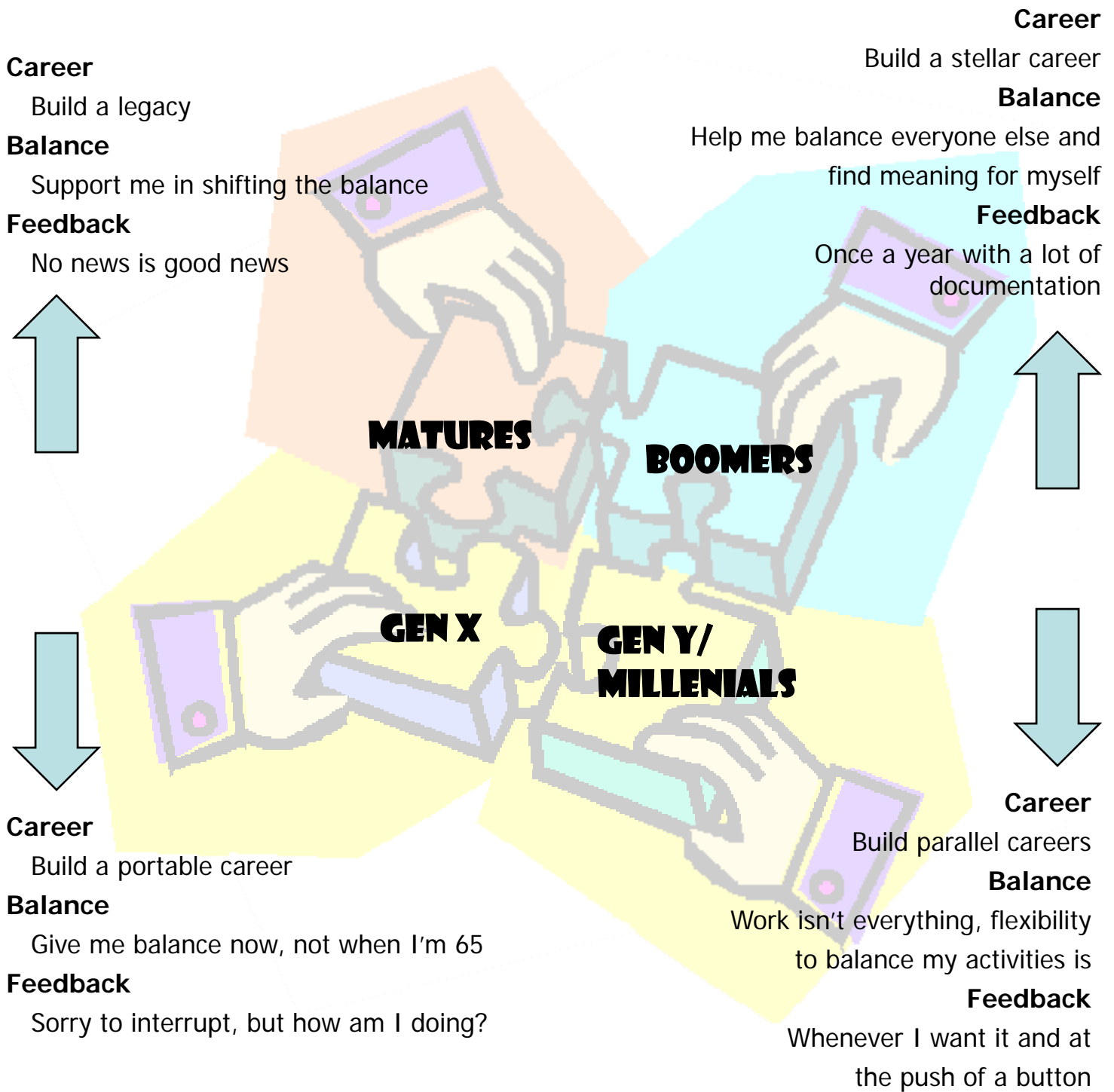
- Honor tradition – history, heritage
- Value loyalty
- Enjoy social aspects of meetings
- Sense of obligation
- Respect authority, titles, roles
- Concerned with procedure, rules, policy
- Willing to serve on a committee
- Value membership

Mindset B:

- Consider tradition confining – value freedom from tradition
- Value integrity
- Meetings should have a specific purpose
- Want to make a difference and contribute
- Value people for who they are, what they bring to the table
- Value freedom to create, alternatives, making it work
- Willing to do the work
- Value participation and volunteerism

<http://www.youtube.com/watch?v=pMcfLYDm2U>

Generations In Today's Workplace/Volunteers



From Lynne Lancaster and David Stillman *When Generations Collide: Who They Are. Why They Clash. How to Solve the Generational Puzzle at Work* HarperBusiness; February 4, 2002

Ask For Involvement The *RIGHT* Way



- R** Reveal all information and expectations.
- I** Identify resources - available or limited.
- G** Get them to share their expectations.
- H** Help make the job or task for work them.
- T** Tell them why they are suited for the job.

The Winning Formula

Match Talent

People and Potential

+

Define the Task

Mountain to Molehill

+

Communicate Expectations

Realistic Results

+

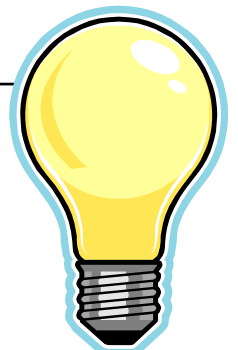
Clarify Commitment

How Many? How Much? How Long?

Capital Region Membership Idea

Membership Roundtable

- Meet monthly on the 3rd Friday
- Same location each month
- Meet from 9-10 am
- Non-members can attend as guests for one time and then must be a CalSAE member if they want to attend again
- No "set" topics each month, but individuals come with an expectation to learn





Building Involvement for Your Association

Why don't members get involved?

Factors Impacting Involvement

1. Internal leadership support
2. Association Programs and Services
3. Response for critical information/research
4. Ability to get involved or involvement experience
5. Compelling reason to continue membership
6. Integrity of communications
7. Recruiter Training/ Recruitment Techniques
8. External business/ e-commerce environment
9. Industry trends
10. Attrition and down-sizing by companies
11. Retirement/Attrition
12. Members not paying for dues
13. Recognition or appreciation expressed

What Else?

Strategies for Getting More Members Involved

- Ask them/Invite them
- Explain the opportunities in EVERYTHING
- Make them feel welcome to participate
- Know your industry and business partners
- Know what "Tasks" are available to match the desired time involvement—high, med, low
- Involve them in the planning process
- Make it FUN and a good time investment
- Provide time commitment in advance
- Give them lower risk "tasks" so they succeed
- Let them know you will assist them and provide all the resources
- Host a "show and tell" at meetings
- Satisfy their "hidden agenda" or "hot button"
- Provide a list of who else is involved
- Show them what they will miss if they don't get involved
- Use incentives/competitions
- Let them buy into the task and take ownership of it
- Give your committee a face lift
- Explain how their project/involvement is critical to the success of the overall vision
- Make it convenient and cost effective
- Provide children and/or spouse events
- Look at ways You're De-Motivating People
- Replace Non-Performers



Involvement Questions to Ask:

Reality Check

What does it feel like to be a volunteer? How could the experience or environment be improved?

-
-
-
-
-

What opportunities exist for volunteering? What could you change or design to offer a variety of opportunities?

-
-
-
-
-

Other Questions to think about...

1. Who is in your volunteer pool now?
2. Who is missing? (industry segments represented, culture, gender, generations, geography, etc.)
3. What talents do your volunteers have that indicate what they might be good at or interested in?
4. What have they enjoyed doing in the past?
5. Where have they participated previously?
6. What do they excel at?
7. What are they passionate about?

How do you ask for involvement?

-
-
-
-
-



Identifying Emerging Leaders

*Think of one or more people in your association that has the ability to lead.
Consider the following questions:*

Person's Name: _____

- (1) What unique perspective does this person bring to our association or a particular project or committee/task force?
- (2) Which of this person's strengths and skills will be the most useful?
- (3) What kind of training, resources, and/or support might help this person become a stronger leader?
- (4) What opportunities can I provide for this person to allow him/her to assume greater responsibility?
- (5) What information does this person require to work productively?
- (6) What are challenge areas that need to be worked on or addressed with this person?

Study on Employee Motivation



In a 2003 survey of Canadian employees:

- **89%** said that being made to feel like a valued employee motivated them to achieve company goals.
- The same number reported that being trained was equally important.
- The survey found that non-cash rewards were key, but only **15%** of the employees said their companies offered non-cash rewards.
- **83%** asked that when being asked to achieve goals that objectives be defined up front.
- **84%** asked for regular feedback on how they were doing on their goals.

From 2003 survey of 1,000 Canadian employees conducted by Maritz Canada and Maritz: Thompson Lightstone. www.maritzcanada.com



Top **10** Desires

1. Involvement -- to be engaged, stimulated
2. Ownership -- to be a part of the plan
3. Empowerment -- the freedom to make decisions
4. Relationship -- social contact or part of a group
5. Competence -- to continually learn and improve
6. Accomplishment -- to succeed
7. Significance -- to make a difference
8. Safety -- to be themselves
9. Recognition -- to be appreciated and rewarded
10. _____ What is yours?



10 Excuses for Not Recognizing

1. Don't know **how** to recognize
2. Don't have **enough time** to recognize
3. People **don't care** about being recognized
4. It's **not my job**
5. **Don't believe** people should be rewarded for "doing their job"
6. Too much **recognition becomes meaningless**
7. Don't have many **options or ideas** on what to do
8. It's **too awkward** or uncomfortable
9. It will make people think they have **done enough** and they will stop working as hard
10. No one rewards me, **why should I** reward anyone else?

From 180 Ways to Walk the Recognition Talk by Eric Harvey, www.walkthetalk.com



Sample Phone Script

Script - Leaving a message.

Hi. My name is (_____) and I am with (______). Like you, I am also a member of XYX Association.

- The purpose of my call is to make sure that you have been able to achieve your goals for membership with XYX Association. I am simply calling to introduce myself and to help answer any questions you might have.
- Please give me a call back at (phone number) and I would be happy to discuss with you further.
- I also wanted to make sure you were aware of the XYX Association Education Conference on April 26-28 in Anytown. It is going to be a great conference, packed with education, statewide networking and fun. The conference has been designed to be a great value for our members! (Possible custom fit here mentioning a program that is appropriate for their title.)
- I will send you an email with a link to the conference brochure so that you can get more information about this event.
- (Name), we certainly appreciate your membership, and I hope we have a chance to talk soon.

Email Message Sample. Use this as a follow up to each voice mail you leave.

Good Afternoon (Morning):

I wanted to take the opportunity to follow up on the voice mail message I left for you earlier. I have found that XYX Association has been a great organization for me and I wanted to find out if you feel that it is helping you to achieve your networking and educational goals within the association community.

I also wanted to make sure you were aware of our upcoming Annual Conference for XYX State Association. It's a great value, and a terrific mix of education, networking and fun. I hope you will be able to join us. In case you want to view the registration materials, I have included a link to the conference brochure: [Conference Brochure](#).

Finally, I have included a list of some of the programs and services offered by XYX Association below. Please let me know if these are of interest to you. I would be happy to discuss them with you anytime.

We certainly appreciate your membership in XYX Association, and I hope we have a chance to talk soon.

Best Regards,
Name
Title
Organization

Sample Email/ Letter Text



Bullet Points – Personal Conversation.

Hi. My name is (_____) and I am with (_____). Like you, I am also a member of XYX Association.

- The purpose of my call is to make sure you have been able to achieve your goals for membership with XYX Association. I am simply calling to introduce myself and to help answer any questions you might have.
- We find most members join XYX Association with specific goals on what they want to get out of their membership.
- Potential Questions to explore their reasons for membership:
 - What interested you in joining XYX Association?
 - Do you have any particular goals for membership?
 - Is there any way I can help you get the most out of your membership?

Note: This section is designed to be interactive – please feel free to answer questions or make suggestions on how the member can better achieve their goals!

- I also wanted to make sure you were aware of the XYX Association Education Conference on April 26-28 in Anytown. It is going to be a great conference, packed with education, statewide networking and fun. The conference has been designed to be a great value for our members!
- I will send you an email with a link to the conference brochure so that you can get more information about this great event. (**Suggestion:** Name one or two education sessions that appeal to you or that might appeal to that person based on their title.)
- We certainly appreciate your membership, and please let me know if I can be a resource to you in the future.
- I will send you a follow up email with a link to the conference registration materials. (**Note:** You can review the Conference Brochure by using the following link: [Conference Brochure](#).)
- Offer to have the person meet you at the conference (if you are attending)!

If the issues are communication, leadership, organization and strategy – our interactive experiences can address your needs. Our content experts combine high-energy activities with relevant processing that gives your group tools they can implement immediately.

What We Do

- Leadership Development
- Staff Retreats
- Communication Skills
- Facilitation Training
- Convention Breakouts
- Conference Keynotes
- Leadership Programs
- Customized Seminars
- Strategic Planning

Your Facilitator

Steve Swafford, Balance Warrior, has worked for more than 20 years for and with organizations in areas of leadership development, communication, membership and executive management. He brings a practical knowledge of strategy and leadership with past associations such as the National Association of Home Builders (NAHB), Club Managers Association of America (CMAA), and American Subcontractors Association (ASA) where he most recently served as the executive director. He is active in California Society of Association Executives (CalSAE) leadership and is serving his second term as Vice Chair of the CalSAE Board of Directors. Steve is also on the Southern California Council and Membership Committee for CalSAE. In 2006, Steve was recognized as CalSAE's Associate Member of the Year. A native of Kansas, Steve has a B.S. in journalism from Kansas State University and a M.Div. from Wesley Theological Seminary in Washington, DC. He is currently a doctoral student in Pepperdine University's School of Education and Psychology focusing on Organization Change. Steve is a co-founder of Leadership Outfitters, Inc.

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