**Sustainability Training**

**Strategies for Retaining Members and Volunteers**

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| **Orientation to Agency or Coalition and its Activities** | |
| * Develop an orientation manual or packet. This may differ for board/coalition members and other volunteers. For board/coalition members, an orientation manual/packet might include:   + Mission, vision   + Organizational chart   + By-laws   + Policies & procedures   + Strategic plan   + Fiscal information (budget, funding sources, etc.)   + Description of standing committees   + History, accomplishments   + Membership roster with sectors * If the new board/coalition member was recruited for a specific sector representation, review the expectations for that sector and the MOU you may ask him/her to sign. * An orientation packet for volunteers should provide general information about the organization, volunteer roles & responsibilities, requirements such as background checks or parent consent forms for youth volunteers and a description of the project(s) the volunteer is involved with. * Hold a luncheon or a Meet & Greet for new members/volunteers. * Utilize other volunteers/members to facilitate orientation or Meet & Greet. * Invite potential volunteers to sit in on meetings or shadow a staff member or volunteer. * Pair new members/volunteers with youth members. * Find out whether new members/volunteers have any special needs that must be accommodated. * Conduct a survey from potential members (best hours/times of day, food needs, etc.) * Discuss where they will best fit. | * Provide options for commitments – short or long term. * Provide incentives (food, t-shirts, logo wear, etc.). * Provide certificates of appreciation. * Invite them to training events and conferences. * Arrange for an article recognizing new members; could lead to potential new members. * Conduct a trivia game after orientation to ascertain whether new members remember and understand important parts of the orientation. * Help them develop their “elevator speech” – how would they represent the organization to other & the community. * Always keep them involved with something they enjoy doing. * Conduct a skills, expertise, experience assessment during a retreat, a breakfast, face-to-face meeting or online. * Utilize each individual’s unique skill set. * Create a profile sheet annually to ensure that the person is being utilized based on their current passion or interest. * Address ways to assist the volunteer. * Be clear about the objectives of what you want to accomplish. * Create a sense of purpose for the stakeholders; create buy-in. * Introduce the new member to staff & other volunteers. * Invite or require new board/coalition members to participate in ongoing strategies or services at least once to get a feel for them. |
| **Meaningful Tasks Based on Interest, Passion, Expertise,**  **Abilities or Sector Roles** | |
| * Keep in mind that you need people for internal work (communications plan, planning & evaluation, fiscal oversight) and external work (workgroups, implementation of strategies, special events, etc.). Recruit intentionally. * Review with each person what they are good at or want to do. * Provide volunteer forms – ask preference (first come, first serve), * Always ask for help if you need people to edit something/or have questions about data. Use their expertise. * Sector roles (utilize those who can help with each strategy – have a committee for each strategy. Research their expertise. * Sometimes people find you because they’re interested in or passionate about what you’re doing. Take advantage of that. * Ask them to do something during a meeting. It often just works out that people volunteer. * Find high level or influential people who are passionate about your focus; they can be your strongest advocates for community-level change and/or generating needed resources. * Match volunteers with things that need to be done in close proximity to where they live or work so they are more interested & convenient. * Give board assessment to each member & assign roles based on this information.. | * Find out what interests new members have and pair them up (strike their spark) in meetings, etc. * Find organizations or committees with issues related to underage or binge drinking and see how you can work together. * Keep an eye out for people who are passionate about what your focus is – at workshops, fun events, etc. – possibly people who are affected by underage drinking. Approach these people who share the same passion. * Have annual reassessments for long term members. * Make sure agency deliverables mesh with stakeholders interests. * Make regular updates internally and within coalition. Example: weekly huddle * Annual retreat to kick off new year * Cultivate personal relationships with members to ensure their needs are being met, including special needs. * Conduct periodic surveys to assess member satisfaction & ways to improve how the agency or coalition functions * Provide stakeholder updates to inform all of different events/activities they may be involved in. |
| **Recognize & Accommodate Personal Needs As Much as Possible** | |
| * Personal needs may include:   + Dietary needs   + Transportation   + Literacy level, Technical literacy   + Time constraints   + Expertise   + Interest level   + Disabilities, physical constraints   + Cultural beliefs, norms   + Community norms   + Language   + Family, work obligations * Poll members about specific needs. * Find out what they can do – how physical can they be? Insiders? Outsiders? * Provide transportation if needed – pick up members, ask others to provide carpool. * Hold meetings in accordance with other events. * Consider literacy levels when figuring out how to deliver your message. * Take time constraints under consideration – family/work, babysitter needed | * Accommodate needs through a buddy system * Identify tasks that can be done from any location. * Find out how many other volunteer opportunities they are involved in. * Make sure they know it’s okay for them to try something outside their interest area * Find out what their expectations are. * Know where they are and meet them there. * Identify needs 7 assess how to use them. * Consider meeting times and length of meetings, i.e. lunchtime, 1 hour * Use variety of notification methods – emails, texts, phone calls, etc. * Keep dietary needs in mind when planning food. * Piggy back meetings for convenience. * Position the CPAW as a subcommittee of Family Connection collaboratives – benefit for small communities. * Conduct conference calls, virtual meetings. |
| **Leadership Development** | |
| * Train new members about your strategies and follow up with them. * List their strengths and passions. Use their strengths and incorporate that into the strategies & programs. * Learn more about each member and their passions. Build actual relationships with them to keep them engaged and interested in the work we do. * Your leaders should mirror the diversity of the communities you serve. If that’s not the case, intentionally recruit new members to increase your agency’s or coalition’s diversity and encourage them to assume leadership roles Provide training and technical assistance to increase skills if they are new to positions of leadership. * Establish a ladder of opportunities so they see there is potential for growth. * Assign co-chairs for workgroups & committees. * Provide training for committee chairs so they fully understand what they need to do to facilitate the process. By having co-chairs, there will always be someone who knows what is going on. * Evaluate how they’re doing periodically. * Provide opportunities for members/volunteers to attend outside meetings or events such as accepting county proclamations, representing the agency/coalition at community forums, participating in meetings with elected or appointed officials. * Encourage members & volunteers to pursue prevention credentialing if appropriate. | * Have their voices be heard and let them know collaboration is important. * Meet elsewhere at times, like a dinner event, not a formal meeting. * Send youth action team or youth advisory board to the Georgia Teen institute for training on strategic planning & leadership skills * Involve youth representatives in the work of the board/coalition/committee as you would adult members. * Mentor teens; pair them with peer leaders. * Conduct specific training events for CPAWs, coalitions, board, other committees. * Consider conducting an annual grassroots leadership program (similar to the ones that are conducted by Chambers of Commerce) to build the leadership capacity of your community. Recruit diverse representation. * As members/volunteers continue serving, provide opportunities for them to move into more challenging positions if they show potential or interest. Recruit likely candidates with intention; they don’t always recognize their potential unless it is pointed out to them. |
| **Recognition** | |
| * Annual recognition banquet, award ceremony * Personal hand-written notes of thanks. * Acknowledge personal days such as birthdays * Acknowledge personal accomplishments, achievements * Involve members when organization is being acknowledged or rewarded * Select staff/volunteer of the month/quarter/year * Invite family members when recognition is being given * Give small tokens of appreciation * Provide public recognition, i.e., yard sign * Highlight different “faces’ of the organization in newsletters, social media, annual report, etc. | * Spotlight members in agency newsletter * At meetings, allow members to highlight what their agencies, organizations are doing * Have an annual award – themed – like, “I’m Thankful For…’ * Hold annual holiday luncheon, themed “Hometown Heros” * Give workgroup members ownership by letting them take the lead in specific meetings, i.e., family attorney takes the lead with social host ordinance rollout. * Recognize specific partnering agencies to highlight who is working with us. * Provide certificates of appreciation.. |
| **Seek Feedback at Sensible Intervals** | |
| * Conduct surveys – community readiness survey, collaborative tool survey * Bi-annually, conduct a workgroup survey * Conduct exit surveys when members or volunteers are leaving * Provide cross training to appreciate positions * Randomly use anonymous online surveys, like Survey Monkey. * Conduct brainstorming sessions. * Ask for outside observations, such as interns who are invited to the group…what do they think about how it’s functioning? * Invite one-on-one members to lunch to find out their thoughts. Ask for donations from local restaurants. * Seek feedback on major events, such as debriefing after events such as Teen Maze. * Take informal opportunities to ask for feedback such as when riding together to an event. Ask for their thoughts. * Establish an app for smart phones or a text message & response * Conduct focus groups * Conduct local workshops * Ask for feedback from staff & volunteers daily. | * When surveying, use paper surveys & online (like Survey Monkey) to meet different needs. * Ask volunteers to complete a self assessment. * Have a suggestion box that is checked regularly. * Use apps for voting on ideas. * Hold face-to-face meetings, lunch meetings * Assign staff members as liaisons to board members. * Have conversations with members * Ask members to complete evaluations at the end of meetings, presentations, training events. * Ask for a “thumbs-up” or “thumbs-down” for ideas raised in meetings. * Pre-determine feedback cycles with intention. * Be open to informal or unsolicited feedback. * Have a “parking lot” for topics that come up during meetings that aren’t being addressed; be sure to follow-up with discussions about parking lot topics. * Be cautious not to overburden folks with requests for feedback or surveys. |