State Infrastructure Project Volunteer Development Manual

Tools To Help Reach Your Volunteer Goals

NATIONAL INSTITUTE FOR REPRODUCTIVE HEALTH

270 STRATEGIES

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Introduction

Whether through education, online advocacy, direct service, training, or organizing, your work is important to protecting and advancing health, equality, and reproductive rights. Your work is recognized as a vital part of moving the reproductive rights agenda forward, and as an essential player in your community you are part of the State Infrastructure Project (SIP).

While each SIP organization has different goals and methods of garnering support for reproductive rights, almost all groups can benefit from capacity building strategies that engage passionate and empowered volunteers or supporters who use their voice, time, or resources to take action towards that goal.

The approach to engaging volunteers and supporters will be different for each organization. Some organizations may rely more heavily on online engagement than offline volunteers. Other groups may be building an organizing program and may need tools to help find and train new volunteers. Finally, some may have robust organizing programs and engaged supporters, but don't see the volunteers growing in leadership. No matter what type of organizing program you have, whether new or old, small or large, this manual will help you start, scale, and sustain a program that will engage your volunteers in an effort to reach your goals.

Starting Your Program

Strategy & Organizing Structure

Strategy

To be able to tackle a new effort, campaign or program, it's helpful to take a step back and assess what you have and what you need to achieve success. Developing a strategic approach can lead you to have an effective program, however this planning phase is often rushed or skipped over in favor of tactic development. Dedicating time to planning your organizational or campaign approach will lead you to better define your path forward and to identify the strategy that will help you reach your goals.

QUESTIONS FOR YOUR PROGRAM:

What is the goal of your program?

Is your goal measurable?

What is your strategy to meet your goal?

How do volunteers help you meet your goals?

ADDITIONAL RESOURCES IN APPENDIX:

Strategic Framework

Campaign Planning Guide

Theory of Change

In simplest terms, your theory of change describes the pathway to achieving your mission. It calls out the problem, accounts for context and available resources, and offers the solution. It demonstrates how every action of your organization works to accomplish progress towards your ultimate vision. Understanding your theory of change helps inform your new campaign strategies, defines the ask you make of supporters and volunteers, and gives more meaning to participation in your organization. By knowing your theory of change, a volunteer can see how their work with your organization makes a difference.

To help you define your path, we recommend starting from the top level of defining your **mission**, then setting your **goals**, developing your **strategy**, and finally identifying the **tactics** and actions that your organization will take.

MISSION, GOAL, STRATEGY, TACTICS

Mission	Ultimate end-result or achievement
Goal	Objective that must be reached to advance the mission
Strategy	Plan of action designed to achieve the goal
Tactics	Specific actions taken to carry out the strategy

Every organization has a mission, it is what you hope to achieve, or your ultimate end result. For example, the mission of NARAL-NY is to promote reproductive rights and expand access to reproductive health care; to some extent many of your organizations have similar missions.

The mission of your organization helps inform your goals: the objectives that must be met to advance your mission. NARAL Pro-Choice New York has the goal of building support for a proactive agenda for reproductive rights, health and justice.

Now you can develop your strategy or plan of action to meet your goal. Strategy brings a focus to your goal and a path for its attainment. Without strategy, it's difficult to be effective. NARAL Pro-Choice New York meets their goal through a strategy of partnerships, capacity building and information sharing.

Lastly, tactics supports strategy, which are specific actions taken. Each strategic approach typically has several tactics. For example NARAL-NY's strategic information sharing can be carried out through a range of tactics such as, webinars, brochures, events, and trainings.

Campaign Planning

Once you have determined your theory of change, framed by your mission, goal, strategy, and tactics, you have the foundation for your campaign plan. Having a written campaign plan not only helps to show your strategy and timeline, but also holds you accountable to the goals that you have set. As you reference this plan, you can use tools to measure your progress and to adjust when the plan isn't performing as expected. Learn the steps to creating a plan in the Campaign Planning Guide in the appendix.

Organizing Structure

If you want a robust volunteer program, you want to have a structure that will support a large base of supporters. Having one person manage all the volunteers is not the best long-term solution. An individual has limits on how many volunteers they can effectively manage. This will lead to limited outreach, lower volunteer numbers, staff burnout, and slower communication and turnaround times. Teams, whether staff or volunteer based, empower leaders, allowing for an efficient, effective, and sustainable way to organize volunteers.

QUESTIONS FOR YOUR PROGRAM:

What is your current organizing structure?

Does your structure allow for growth?

What are the different levels volunteers can engage with your program?

ADDITIONAL RESOURCES IN APPENDIX:

Organizing Fellow Job Description

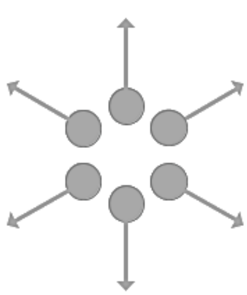
Volunteer Roles

Volunteer Development

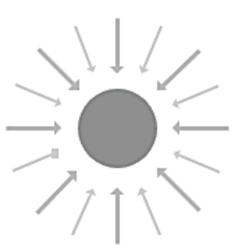
Organizing Models

The team structure provides sustainable amounts of management, pathways for open and honest communication, and clearly defined roles and expectations for each volunteer. It helps the volunteers be more invested. In addition, teams are interdependent and have a shared responsibility—setting and meeting goals together. A successful volunteer team will set goals, meet those goals, be prepared, engage others in the process, learn from doing, set rules/norms/boundaries, have a diverse group of people, and build in time and space to coordinate actions.

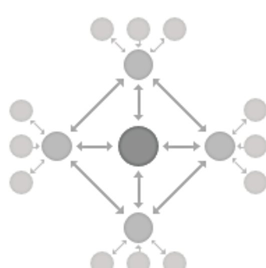
ORGANIZING MODELS



No leader, no direction

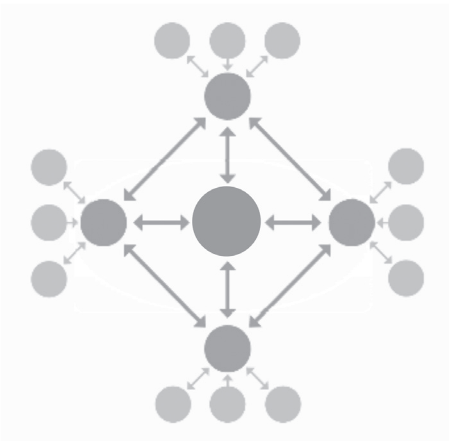


One leader with all the knowledge and power



The snowflake

Not every team structure will work well. In a team with no leader, there is no effective structure to organize towards goals. In a team with only one leader, the team leader's capacity is always maxed out and other volunteers lack empowerment. In the snowflake team model, teams are empowered, sustainable, and committed.



Snowflake Model

The snowflake model is one effective version of a team structure, and can be a good ideal to work toward as you are building an organizing program. This model provides strong support to the team leaders and team members. It is composed of:

One organizer at the center—this can be a staff member who has significant time to devote to volunteer management or a committed volunteer leader. If a volunteer meets this role, it is crucial that they report to and interact with a staff member on a regular basis.

Team leaders who report to the organizer—volunteer leaders can be determined by region, issue, or program.

Several team members per team leader—the volunteer leader organizes these volunteers to reach goals while coordinating and reporting to the team leader.

In the snowflake team model, teams are empowered, sustainable, and committed. This model works because it allows:

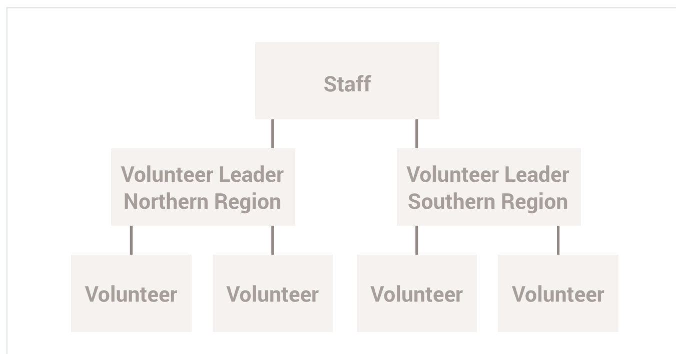
- Sustainable amounts of management: No one leader or staff member has to manage all of the volunteers, they only have to be responsible for their own team
- Clear pathways for open and honest communication between staff and volunteers
- Mutual accountability: Everyone has someone to report to, and each role is accountable to one another, whether volunteer or staff member
- Clearly defined roles and expectations
- Shared responsibility: No one feels overburdened
- Multiplying effect: The snowflake lends room for continued growth

Alternative Models

While the snowflake is ideal, not every organization is at the point where they can develop a full snowflake. As you begin to grow your volunteer program, your snowflake may not be fully built out and may look more like one of the following models:

Primary Model: One organizer or staff person, a few volunteer leaders and a group of supporters who occasionally turn out for events and activities. For your active volunteers it is helpful to develop and recognize them as volunteer leaders so as your program grows they are ready to assume greater responsibility. Until they are running their own team of volunteers they can help you with supporters who do one-off volunteer activities.

Small Team Model: A staff person and volunteer teams, with a volunteer leader who manages the other few volunteers. A staff person can be an organizing fellow, part-time or full-time, and with strong enough volunteer leaders this does not need to be the staff member's full time responsibility. Teams can be based on issue areas or the community they live in. Overall these teams can vary to meet your needs.



Expansive Model: Multiple staff, multiple teams. In this phase you have more organizing staff helping to manage volunteer leaders, and core volunteers who support their leader by owning a responsibility such as data management, or digital engagement. Underneath core volunteers are the supporters and one-off volunteers who are active but don't own any part of the program.

Ladder of Engagement

Prospective volunteers move up a ladder of engagement by taking on incrementally larger responsibility and commitment. An important part of volunteer engagement and development is meeting prospects where they are. You would never ask a volunteer who has never taken action to commit to being a volunteer leader. Instead, you would work to build a relationship with them, turn them into a volunteer prospect and eventual volunteer. Many times, volunteer prospects are found online. In the next section, we'll address how to move supporters from online engagement to offline action.

Here is a common ladder of engagement for volunteer leadership prospects. Though there are often many small actions that occur between each rung of the ladder, this represents how a volunteer becomes a volunteer leader.

STEP ONE

A potential volunteer often starts as a supporter, perhaps donating to your organization, attending an event or liking something on social media.

STEP TWO

A supporter becomes a volunteer prospect as they take direct action online and/or offline.

STEP THREE

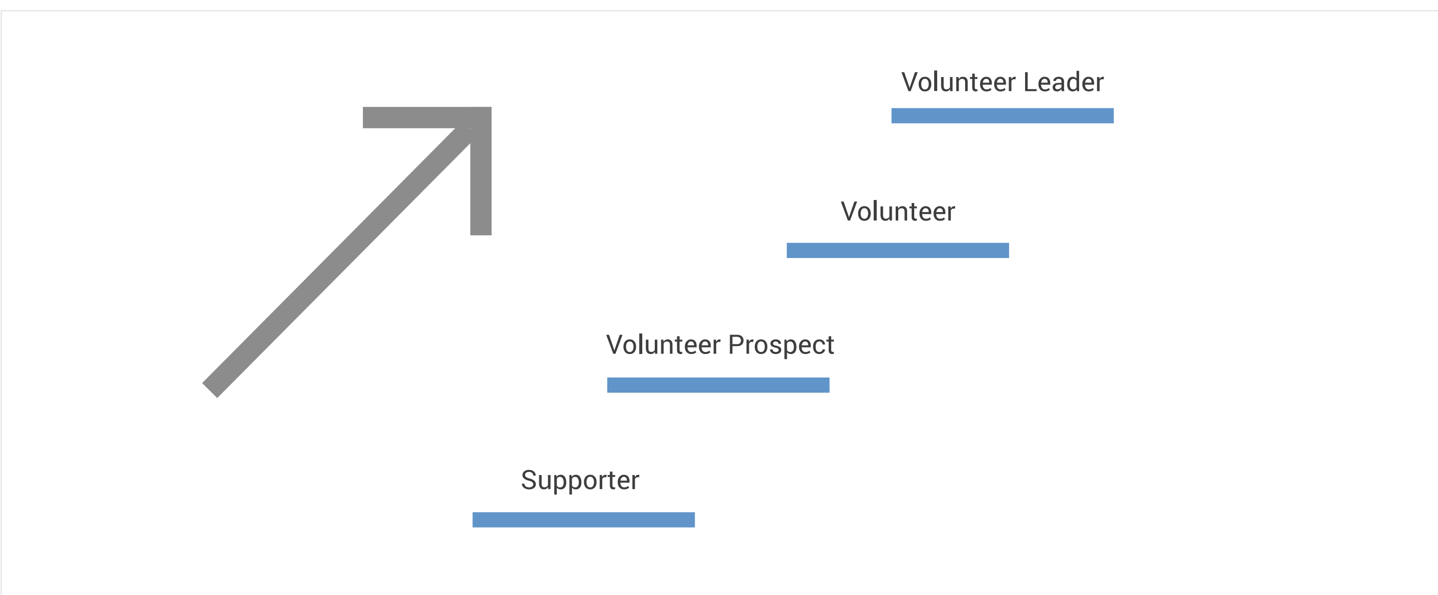
A prospect becomes a volunteer when they take action regularly and helps move others to action.

STEP FOUR

A volunteer becomes a volunteer leader when they give more time and commitment to organize events and lead other volunteers.

When thinking about your organization's specific ladder of engagement, it is important to consider what steps you and your volunteers will take to move prospects up rungs, and what activities you will offer to keep your prospects involved regularly. We will discuss both topics in the next section. (also see Volunteer Development worksheet in appendix).

LADDER OF ENGAGEMENT



Scaling Your Program

Volunteer Recruitment & Volunteer Engagement

Volunteer Recruitment

Now that you have learned what the ladder of engagement is, you know that there are steps to take with supporters before they become active volunteers. In this section we will focus on how you find volunteer prospects, how you move them to become volunteers, and how you develop them into leaders.

Finding Volunteer Prospects

Any activity where your organization is present can be a recruitment opportunity. From having a volunteer sign up at your table at a health fair, to recruiting volunteers through your website or Facebook pages, to even having your staff recruit their friends and family with commitment cards, you can start to build a base of volunteers just by asking.

Using a series of increasingly engaging events is another effective way to build your volunteer prospect list and move prospective volunteer leaders up the ladder of engagement. Social events with a broad invite reach will provide you a list of prospects from the attendees. Follow up events, trainings, and one-on-ones will help you continue engagement maintenance with these prospects. You will funnel a broad list of members down to a small list of strong and engaged candidates for volunteer leadership positions.

There are many paths to use when designing an event-funneling plan. The most important aspect is creating an engagement calendar so you are prepared for recruitment, execution, and follow up. One path is described below.

QUESTIONS FOR YOUR PROGRAM:

Where will you find your volunteers?

How does your program benefit volunteers?

How do you engage volunteers online?

What tools are you using to engage supporters online?

ADDITIONAL RESOURCES IN APPENDIX:

Holding Effective One-on-One Meetings

Sample Volunteer Recruitment Conversation

Best Practices For Making An Effective Ask

Social Event

To cast a large net, the first event you organize should be primarily social. You should use the event to talk briefly about volunteer work and to have your staff and volunteer leaders mingle with prospects. You should recruit for this broadly, testing different recruitment efforts and observing their effects. Emails, phone calls, and letters have all been proven to be successful recruitment efforts for events. Make sure to make confirmation calls and send reminder emails to all attendees the night before the event!

At this event, you should have mandatory event sign in and clear next steps for the attendees to take. Ideally, you would have a follow up volunteer opportunity scheduled so attendees can sign up directly at the event.

Follow up after this event should be completed as close to the event as possible. You can send a thank you email with a link to sign up for another event or share information about your volunteer work. Ideally, a volunteer leader would call attendees to thank them for attending and to offer next steps.

Follow Up Event

Within a month of the initial social event, you should engage your prospects again. You can do this by inviting them to an existing volunteer opportunity like a community service event or by creating a more focused listening session. This event should either be an explicit volunteer action, a skill building session, or a more in depth discussion of volunteer work.

Event Best Practices

1. Keep event recruitment and sign in tight

- Recruit attendees through phone or email and confirm with sign ups before the event.
- Sign in every attendee to ensure easy follow up and have event registrations printed at sign in table to ensure a quick and easy sign in process.

2. Make the agenda match the goals of your event

- Invite current volunteers to mingle with new volunteers and prepare them to discuss their work with your organization. Hearing about the volunteer experience from current volunteers creates a welcoming environment.
- Have volunteers deliver the message of the evening and keep the program reasonably short. Putting volunteers, rather than staff, front and center emphasizes their importance in the organization.

3. Provide immediate next steps

- Thank you letters give the attendee something to take home including your organizations information.
- Have sign up sheets for attendees to sign up for specific volunteer events or opportunities. Many volunteers will leave saying they wanted to help with specific activities that they heard mentioned during the program. Capturing that information is essential. You will want to collect their name, phone number and email address, and zip code so you can later plug them into activities in their area.
- If there are no upcoming events, have “Sign Up to Volunteer” forms for attendees who express special interest in working with your group.

4. Be mindful of your audience

- Plan the event location, date, and agenda around your goals. If you want to reach out to younger volunteers, plan an event in the early evening. If you want to reach out to older volunteers, avoid scheduling events at times they will not want to drive.

5. Make the event fun

- Provide refreshments at events when possible.

Moving a Prospect to a Volunteer

After building a list of prospects, you will use specific tactics to move prospects up the ladder of engagement.

Using Your Personal Story

Crafting and communicating personal stories has been a well used tactic from politics to business to entertainment. Stories bring us together around our shared experience and shared values. Connecting on shared experiences creates a sense of community, while connecting on shared values creates a personal connection. Relationships create a shared force for action.

Using your personal story with prospects and volunteers will build relationships and help move your supporters to take action. Effective organizers weave their personal story in everywhere. Your story can be used on the phone, in one-on-one meetings, in email and social media, and at events. Your story can both help to recruit volunteers, and to ask volunteers to take on a leadership role.

When you are developing your personal story, think about these questions:

- What will I be calling on others to do?
- What values move me to take action that might also inspire others to do the same?
- What stories can I tell from my own life about specific people or events that would show rather than tell how I learned or acted on those values?
- How does my story change based on my audience?
- Does my story have a beginning, middle, and end?
- Does my story end with an ask?

Each time you tell your story, you should strive to have this narrative arc.

- **Challenge:** The challenge is what made you realize you needed to take action. Did something specific happen to drive you to begin working on reproductive rights?
- **Choice:** What action did you take? Your choice describes what you did in response to the challenge.
- **Outcome:** Review what you are currently doing with your organization and how it relates to your values and experience.
- **Ask:** Discuss how this prospect can help by taking action.

Your story is personal—develop it in a way that you are comfortable with and proud to share. Make sure your story has a sense of urgency, hopefulness, and always ends with an ask.

One-on-ones

The best way to build a relationship with your volunteers is to schedule one-on-ones. It is also helpful to have your staff and/or volunteer leaders hold one-on-ones with prospects after a prospect has expressed interest in volunteering.

A one-on-one conversation consists of just you and the individual with whom you are looking to build or maintain a relationship. A one-on-one meeting allows you to introduce yourself, allows the volunteer to get to know you and helps you connect with their values in a comfortable, relaxed setting. Showing the individual that they are important to you and that you are willing to invest time in them is a way to show them how much you value their involvement. Different situations call for different types of meetings:

1. Recruitment/Introductory

This is the most crucial and important one-on-one. These meetings should come at the start of a relationship with a new volunteer, to connect them with a staff person or lead volunteer and establish a connection based on shared goals and values.

Uses:

Have staff follow up with a supporter who has just attended an event or signed up to volunteer for the first time.

Goals:

- Make a personal connection and use your shared story to identify their motivation for volunteering
- Begin to build a relationship, which will make the volunteer more likely to follow through on volunteer commitments
- Gauge interests in specific volunteer activities
- Make a specific ask and move the volunteer to an action based on what you've discussed (think about the volunteer's aptitude, skillset, and connections)

2. Maintenance

These meetings should occur between a staff person or lead volunteer and a newer volunteer they already know. Perhaps the volunteer has come to quite a few events or engaged in volunteer activities over a few weeks. These can also be used to solve any conflicts or debrief any events or activities.

Uses:

Have volunteer leaders follow up with newer volunteers.

Goals:

- Check in with volunteers who work with your organization regularly
- Continue to build the relationship with volunteer
- Make sure the volunteer is happy with opportunities and still feeling connected to your organization's mission
- Work through any tensions or conflicts

3. Escalation

These types of meetings are for volunteers who are ready to become volunteer leaders. The volunteer should be ready to take steps towards assuming more responsibility and taking on ownership of goals.

Uses:

Have staff or volunteer leaders meet with strong volunteers to help build their volunteer team.

Goals:

- Thank the volunteer for their work to date
- Talk through possibility of taking on a leadership role

as a volunteer leader
- Explain the responsibilities, roles, and expectations of the position

Making an Effective Ask

When asking a volunteer to take action, you must make an effective ask. This is true both online and offline. An effective ask is simply an ask that results in a commitment to a specific action. Below are examples of different asks.

"Sorry to bother you but is there any possible way you might be able to volunteer for us at some point in time?"
This ask is not an effective way for recruiting volunteers- it is weak, apologetic and it gives prospective volunteers the opportunity to say "No." The prospective volunteer should never feel like he or she is making a personal favor but rather being given the opportunity to contribute to their community.

"Can I count on you to help with sign in at our Women's Reproductive Health Forum this Saturday afternoon?"
This ask is strong. This limits the possibility of a "No" and empowers the prospective volunteer to action. The prospective volunteer will most likely say, "yes" because he or she has a specific option for an event. Hard asks like this one will increase the number of scheduled volunteers and overall participation.

Effective asks have these elements:
- Efficiency: Use the time well–be ready!
- Respect: Make the group you are working with feel comfortable
- Introduce yourself: Who are you? Establish legitimacy
- Identify challenge & goal: Talk to community members about reproductive health
- Present Solution: Be upbeat, specific & action-oriented
- Stories: Integrate an abridged personal story into your pitch
- Pull it together: Have a brief wrap-up with next steps

Online, whether it is in a personal email, a mass email, or a social post, it is also important to make one direct ask. Keep the content really simple: Why are you writing? What's the "problem" or why is this moment relevant? What can the volunteer do about it?

Tackling a No

Some prospects you speak to will say no, no matter how effective your ask is. Be prepared so you can convert an initial no into a later action. First, think about why this person is saying no. Are they just busy and unable to take action right now? Are they opposed to performing the specific action?

There are three types of no's and you should respond to them differently. When people say no, they are either saying, "Not now," "Not that," or "Not ever." Pay attention throughout your conversation to determine which kind of no they are using and tackle accordingly. Provide different time or activity options for the first two and prepare yourself to get the third occasionally.

Do not be afraid to ask someone multiple times with a cascading ask. Here is an example of a cascading ask:
- "Can I count on you to volunteer on Wednesday?"
- "Ok. Are you free to attend an event this Saturday instead?"
- "What day works best for you?"

Remember, practice will make you more comfortable and your ask stronger.

Moving a Volunteer to a Volunteer Leader

After you have transitioned a prospect into a volunteer, you must assess them for leadership traits in order to move the volunteer up the ladder. You should assess leadership prospects to make sure they have the right qualities to become a volunteer leader. To escalate a volunteer, you will first observe them to ensure they are team players that can recruit other volunteers and take on responsibility.

When looking for volunteer leaders, you should pay attention to leadership traits. An ideal volunteer leader is passionate, collaborative, and scrappy. Leaders must be committed to the cause. This will affect their ability to effectively channel your mission, and their interest in understanding the issues you fight for. An interest in working with others will be key to harnessing the skills of other volunteers, training effectively, and maintaining the overall chemistry of the leadership team. Also, a good leader gets things done–even when the means of doing so are not obvious. This means understanding local resources, knowing how to bring in talent, and possessing a relentless commitment to the cause.

By giving your volunteers responsibility, you will be able to assess their leadership qualifications. Have leader prospects run sign in for an event, recruit volunteers for a day of action, or lead a community service event. This will help you see if your volunteer is a self-motivated team player.

If your leader prospect responds well to the leadership you have given them, hold a one-on-one to officially escalate their role. Use this time to formally commit him or her to the role. This will create a clear mutual understanding of what will be expected.

Overall Volunteer Recruitment Best Practices

Volunteer recruitment is a vital aspect of your volunteer engagement plan. It is crucial to reaching your goals. Below are best practices that will bring more volunteers into your organization and encourage them to stay committed.

1. Build strong relationships
- Strong relationships are the foundation of a volunteer organization–prioritize your relationships at the outset and check in on them often.
- If a volunteer has strong relationships within the organization, they will be more likely to follow through on their responsibilities.

2. Tell your personal story
- Talk to your prospects and volunteers about why you are committed to your organization’s mission.
- Connect on the shared values and experiences they have with other supporters, volunteers, and staff.

3. Tie it back to the picture and give context; explain why
- Explain why it is important for the volunteer to commit to this small action–how will their action help with your organization’s larger goals?
- Review the impact their action will have and why it is important.

4. Emphasize local
- Help prospects and volunteers realize how their action will affect their own community.

5. Match activity with skillset
- If a prospect is a particularly abled writer, find opportunities for them to write; if a prospect loves talking about issues that effect young women, find opportunities for them to do so.
- Volunteers will be more likely to complete an action if it’s something they are capable and excited to do.

6. Make an effective ask

- Be specific and straight-forward with your asks.
- Do not provide any "outs" for prospects.

7. Set clear goals and expectations

- Explain to prospects why their help is so important–you need to reach certain goals in the region!
- Set your volunteers up to succeed. Tell them what you need for them to complete so they can meet their responsibilities.

8. Anticipate a 50% flake rate

- Be aware that many volunteers flake–this just happens! Be prepared for a 50% flake rate by scheduling more volunteers than you need and making confirmation calls the day before a commitment.
- If a volunteer flakes, follow up with them as soon as possible to schedule them for another action.

9. ABC: Always Be Closing

- Be constantly on the look out for opportunities to make volunteer asks. When a volunteer returns a call sheet, or checks in after an event, ask them right then when they will take action next.
- Ask more than you feel comfortable asking.

10. Say thank you

- This is extremely critical! Thank volunteers for their work and remind them of the big impact their action caused.
- Find opportunities to make sure volunteers feel appreciated.

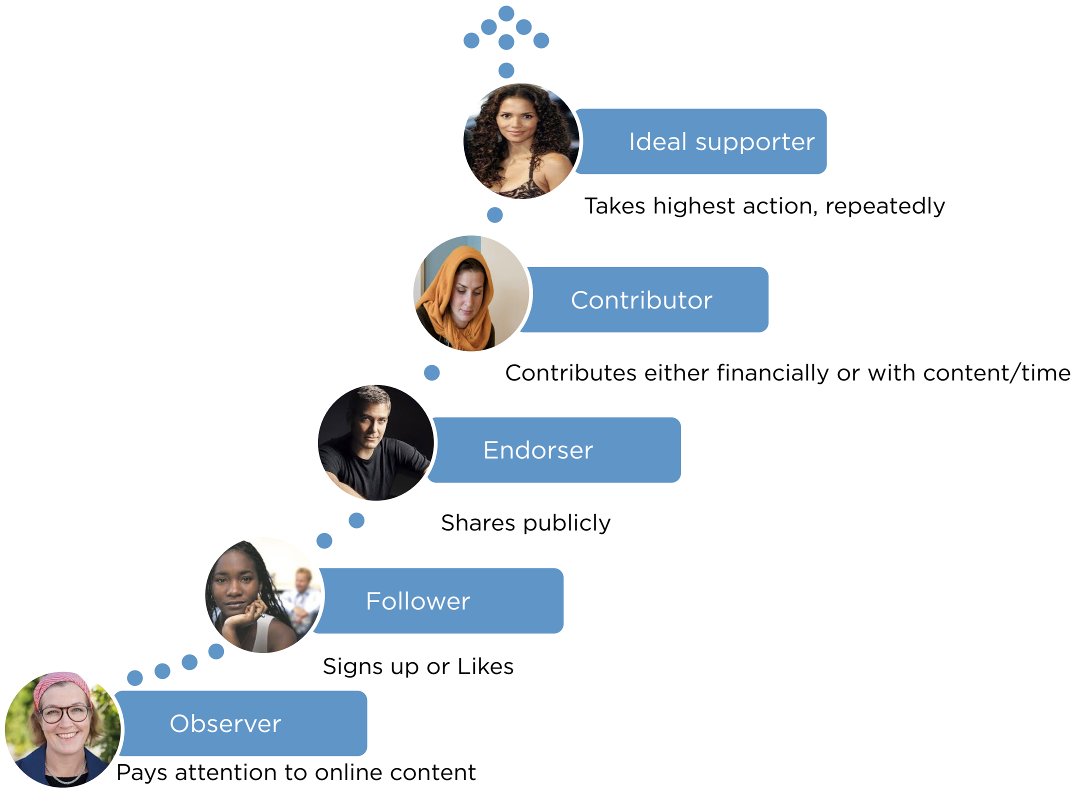
Digital Strategy to Support the Ladder of Engagement

One of the biggest goals of any digital program is "organizing." Moving users from online engagement to the offline action is critical to your mission.

As such, it is important to identify the actions we want users to take online that will move them up a ladder of engagement to lead to offline action.

We need to have a firm sense of where we want users to go once we bring them into the community. Users will enter the ladder at different points – that's okay!

An example ladder of engagement is:



The organizing goal of the digital program should be to help users make the jump from being an "online endorser" above to an "offline supporter."

Logistically, this means going back to what we discussed at the beginning: it's important to meet users where they are. An example of a simplified digital program that does this could be:

1. First, let's get a user to sign up to our email list.
2. Let's ask the user to share some of our content with their own social networks.
3. Then they might be ready to share their own personal story with us.
4. Then we can ask them to RSVP to an event. [HERE'S THE PIVOT TO OFFLINE!]
5. If they attend the event, the grassroots relationship can start as they are face-to-face with a volunteer leader or organizational staff.

Similarly to the offline approach, digital programs should be careful to make the right ask to the right users. You should stay away from asking brand new signups to host events. Use the ladder of engagement theory to slowly escalate their commitment levels.

Volunteer Engagement

Once volunteers are active and signed up with your organization or chapter it's important to keep them engaged. There are a range of non-electoral online and offline activities to engage your volunteers.

Offline Tactics

Phone Banking

This is the most efficient and accessible way to contact potential volunteers. Talking directly to people can make a huge impact on their knowledge of important issues and their willingness to mobilize on behalf of those issues.

- Volunteer recruitment phone banks
- Issue education phone banks

Social Events

Social events are an excellent opportunity to show appreciation to your current volunteers and get your prospective volunteers fired up about your organization's issues and reproductive rights. They can also be a way of introducing a prospective group of volunteers to the organization, with the goal of building a community and connecting with the organization in a less formal manner.

- Happy hour
- Young professional event
- Trivia night
- Book club
- House party
- Story collection party
- Watch parties (great for televised debates)
- Data entering party

QUESTIONS FOR YOUR PROGRAM:

What are your activities for volunteers?

How do these activities connect to your goals?

How do you train volunteers to do these activities?

ADDITIONAL RESOURCES IN APPENDIX:

C3 Volunteer Actions and Tactics

C3 Volunteer Digital Activity and Tactics

Sample Volunteer Sign-up

How to Host a Great Phone Bank

Phone Bank Guide

Call Tally Sheet

Guide for Planning Events

Event Checklist

House Party Host Guide

House Party Checklist

House Party Attendee Brainstorm List

Small Business Outreach Plan

Educational Events

These are great to help keep volunteers engaged, informed and knowledgeable about reproductive rights and abortion issues.

- Speaker series
- Panel discussion
- Film screening

Trainings

Using a train the trainer model, trainings provide an opportunity to help volunteers develop new skills.

- Insurance access training
- Sexual health training
- Sex educator training
- Recruitment training

Tabling

Tabling at events is a great way to spread the word about your organization and issues as well as connect with the community and recruit volunteers.

- Farmer's markets
- Community events
- Concerts
- Fairs
- Colleges and universities

Office Support

Office Support is aimed towards volunteers who want to engage with lighter actions and have availability during the workday.

- Data entry
- Mailing direct fundraising asks
- General office support

Online Tactics

Online tactics and the use of social media are great to engage volunteers who want to be involved, but may not be available to attend social or educational events in person.

- Forwarding an email to a friend
- Sharing organizational content to their networks
- Sharing their own personal story with the organization
- Signing a petition, birthday card, thank you note, etc.
- Twitter town halls
- Writing a LTE using an online forum
- Tweeting at an elected official or other political target
- Ask me anything online forum – with reproductive health expert
- Webinars
- Google hangout conferences

Sustaining Your Program

Volunteer Retention &
Organizational Infrastructure

Volunteer Retention

You now have the tools to recruit, engage, and escalate your volunteers, but it takes special attention to keep your volunteers motivated and committed throughout all seasons. Obviously it is easier to keep current volunteers involved than to constantly recruit new volunteers (though you get to do both!).

Volunteers get involved for a specific issue or an interest in your mission, but they stay involved because of the relationship they build with you.

Your volunteers' commitment will increase as your commitment to their development increases. Investing in volunteer training and development will strengthen your organization and allow you to pass leadership over to volunteers.

Focusing on volunteer retention will make it possible to continue growing while using the skills and expertise of your current volunteers to meet your goals. In this section, we will review best practices for retaining volunteer leaders and tips to keep less committed volunteers active.

QUESTIONS FOR YOUR PROGRAM:

How do you prepare for your volunteers before they arrive?

How do you reward volunteers for their participation?

How do you engage them over time and keep them interested in your work?

ADDITIONAL RESOURCES IN APPENDIX:

Training Best Practices

Volunteer Leader Retention

All volunteers should be integrated into your team structure–whether they are leaders are not. You have learned the benefits of using a team structure; all of your volunteers should know about their team and feel a part of their team to utilize those benefits. This will make volunteers feel more invested, responsible, and empowered.

Cultivating the relationships between your volunteers is your job. Seek opportunities to increase fun, build a sense of responsibility for each other, and develop a team dynamic. Volunteering should be fun–make fun a priority!

Volunteer leaders have made a large commitment to your organization–but they are still volunteers. When you have successfully used relationship based organizing to convert a volunteer into a leader, your work is still not done. Through check-ins and rewards, you will continue to develop your relationships with volunteer leaders.

Best Practices

Check in regularly

- Check-ins give you opportunities to have honest conversations about capacity and effectiveness.
- Holding one-on-one conversations with your leaders will keep your relationships strong and make your leaders feel important.

Coach your leaders – training never ends

- Your leaders should never stop being trained–do not forget to invest in training your established leaders.

Reward volunteers with access to events and conference calls

- Find opportunities to show your appreciation.
- Spotlight all-star volunteers in volunteer meetings, on social media, and on email.
- Make volunteers feel like they get perks for their commitment in addition to their enhanced relationships and opportunities.

Host social volunteer events

- Occasionally organize events that do not require work from your volunteers.
- Give your volunteers an opportunity to relax and have fun with each other.

Give your volunteers more responsibility when they are ready for it

- Responsibility keeps volunteers invested. Reward committed and trained volunteers with more responsibility.
- Be up front with your expectations.

Training and Development

To build a strong volunteer organization, you must invest in training. Trainings empower leaders while developing skill sets and allowing for collaboration. Organizers include training as frequently as possible–not all trainings are full day events.

Below are four types of trainings you might hold. Volunteers should move through different levels of training as they gain experience and take on more responsibilities. It is important to reflect on what kind of training you are holding as you plan the agenda–make sure your training is meeting your goals.

Recruitment

- Recruitment trainings are short sessions that serve as recruitment tools.
- Any opportunity to talk about your mission and work can be a recruitment training.
- Examples: Social events, community events

Introductory

- Introductory trainings provide a formal introduction to roles within the organization.
- These include volunteer orientations, new team member and new team leader trainings.

Development

- Development trainings develop confirmed leaders. These strengthen your team by strengthening your volunteers.
- These can include skills webinars or professional development trainings.

Advanced

- Advanced trainings include planning and next level development.
- This can include planning and strategy meetings with your staff.

Best Practices

People learn and interact differently. Use a diversity of training methods to accommodate different learning styles.

- Visual
  - Powerpoint slides
  - Pictures, charts, graphs
  - Colorful visual aids
- Auditory
  - Lectures
  - Discussion
  - Reading step-by-step instructions aloud
- Reading/Writing
  - Reflection and free writing
  - Handouts and readings
  - Worksheets and note-taking
  - Flipcharts
- Kinesthetic
  - Role plays and simulation
  - Case studies
  - Real life examples
  - Hands on practice

While training, keep your audience interested:

- Make it interactive
- Include role-plays where appropriate
- Vary your tone and energy
- Ask for repeat backs
- Use co-trainers when possible
- Use breakouts and encourage best practice sharing amongst the attendees
- Recognize the experience in the room

Rescheduling & Reengaging

Not all of your volunteers will become leaders or members of a team. You still want them to come back as often as possible. Below are some possible reasons people do not return to volunteer after their first action:

They don't feel it is worth their time.

- No one explained why the work they're doing is important.
- They are uncomfortable doing what you have asked them to do.
- They feel overwhelmed by the tasks and goals.
- The volunteer environment is unwelcoming.
- No one recognizes their contribution.
- No one asked them.

If a previous volunteer expresses hesitation to return, have a conversation with them to figure out what reason is at play. Work with the volunteer to help address their concerns and hesitations.

Best Practices

All of your events should have a sense of continuity—volunteer retention never ends

- Reschedule every volunteer before they walk out the door.
- Have sign up sheets available and have your ask ready.

Be ready for volunteers when they arrive & debrief with them after their shift

- Show your volunteers that you are prepared and invested in their work.
- Debriefing gives you an immediate opportunity to address concerns and celebrate successes.

Don't tell; show

- Work alongside your volunteers or have an experienced volunteer work alongside them.
- It's a great way to build relationships and earn credibility.

Be inclusive and empower your volunteers

- Train your top volunteers.
- Ask them to take responsibility.

Confirmation Calls

Once you have successfully recruited your volunteers, make sure to always confirm them by calling them, at minimum, 24 hours before an event. Remind them of their commitment and that the event will be fun and exciting. Best practices include:

- Make three rounds of calls, leaving a message only on the third pass.
- Always repeat the details of the event (date, time, location).
- Encourage the volunteer to bring a friend or family member with them.

Organizational Infrastructure

In order to sustain your program and continue to grow, it is necessary to have the right systems in place. Having the right data management tool and system will help your organization reach more people, track your progress to your goals, and evaluate your program.

Regardless of the size of your organization or programmatic goals, using data will help you reach the right people for your message, and increase the effectiveness of your program, while maximizing the use of resources. Data makes targeting potential supporters, volunteers, and action takers easy—especially with more information. The more we know about people, the more effective and accurate targeting efforts can be.

Data also helps set realistic goals and strategy for your programs. Looking at past activity, and supporter engagement makes it possible to predict what future programs should look like, and what to expect. This institutional and programmatic knowledge can be used by all parts of your organization when planning specific campaigns, or general outreach.

Data Management

The first step to effectively manage your data is to acquire a database/CRM (customer relationship management tool) such as Salesforce, Nationbuilder, or NGP VAN. In the database you can track information about people, including basic demographics, online activity metrics (signed petitions, shared content), and offline activity metrics (event attendee, canvasses, phone calls). Tracking this data will allow you to see where members come from (events, petitions, social sign ups), how members grow (increase in activity), and what they find most engaging (high participation rates).

QUESTIONS FOR YOUR PROGRAM:

Do you have a system to manage and report data?

How do you use your data with staff?

How do you use data to help with goal setting?

ADDITIONAL RESOURCES IN APPENDIX:

Digital Best Practices

Data Tips

Even with a small number of people to track, keeping everything in a central location that is designed to organize and display information on people and their actions has a number of benefits:

- Reduces chance of human error by dictating how and where data should be entered.
- Accessible across the organization–anyone at your organization can have a login, and have access to the data they have been given permission to view. As new information is entered, it's updated for all users at the same time. Conversely, more than one person can't functionally use Excel at a time and Google Docs lacks the sophistication needed to do real person management.
- Set up permissions to control who has access to which data.
- Easy to scale as supporter list grows–Excel gets unwieldy as you more rows of supporters.
- Easy to search for individual people–in Excel all the information lives in a table, so it is hard to read when there are more than so many columns. In a CRM, records have a page that displays all their information clearly.
- Easy to create groups of people with similar characteristics, like donors, volunteers, or event attendees. With these lists, you can tailor your outreach depending on your ask. In Excel, filtering can be unwieldy and complicated.
- Can be used as your online tool, or connected to your online tool so actions that people take online are automatically accounted for in the database in real-time.

Goal Setting

Creating goals is key to managing expectations and tracking the success of your program. The process of goal setting and tracking against these goals on a daily or weekly basis will help you with future capacity building and growth. Goals will also help you determine what programs are not working well, where additional training might be needed, and where to target your resources. Without setting robust goals, determining the impact of your program will be more difficult.

The first step is determining what goals you want to set. In the example below, goals are set for the number of volunteers needed in each of the volunteer roles (described in the Organizing Model section) and the actions you want supporters to take. The volunteer goals are numerical entries that reflect the number of people you want in each position to accomplish your action goals. The action goals are the percentage of supporters you want to take each action.

GOAL SETTING OVERVIEW

Goal Setting	
Capacity Building	
Volunteer Leader	5
Volunteer	50
Volunteer Prospect	100
Supporter	200
Supporters Engaging in Actions	
Pledges	60%
Letter to the Editor	10%
Share your Story	15%

Once these top-line goals have been set, the next step is to dive deeper into these numbers to see how they are being met (or not being met) over time.

For volunteer growth, we suggest tracking on a weekly basis. As people are trained and move up the ladder of engagement, they can be added to your total for that role. As time passes and more people are trained, each of these buckets should grow. Please note that the Total is not a summation of the prior weeks, rather each week represents the total number of trained volunteers in that role, thus the Total is the same as the most recent week.

VOLUNTEER GOALS BY WEEK

Metric	Goal	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Total
Capacity										
Volunteer Leader	5	0	0	1	1	2	2	4	5	5
Volunteer	50	2	5	10	17	20	25	38	45	45
Volunteer Prospect	100	5	20	43	50	67	82	90	104	104
Supporter	200	10	36	50	80	95	130	175	190	190

The action goals need to be tracked by event. Tracking by event allows you to compare metrics across event type, location, date, or any other characteristic. Tracking this information will allow you to further refine your goals for future events. For each event, the total number of each action taken and the percentage of the total attendees who took that action should be recorded. This will allow you to track against percentage goals. If you are consistently hitting your goals at an individual event level, and over all, then a conversation should be had around setting new higher goals. If these numbers dip, or fluctuate, the goals might be unrealistic and need reevaluation.

The numbers on individual events should also feed into a monthly report that shows how many actions you are aiming for, and how many actions have been completed in a month.

ACTION GOALS ACROSS EVENTS

Metric	Goal	Tabling		House Party		Total		
Events per Month	30	12		10		22		
Avg. attendance per event	47	80		20		53		
Attendance total	1540	960		200		1160		
Supporters Engaging in Actions		# of Actions	% of Attendance	# of Actions	% of Attendance	Total Actions	% of total	Avg. %
Pledges	60%	540	56%	175	88%	715	62%	68%
Letter to the Editor	10%	110	11%	25	13%	135	12%	11%
Share your Story	15%	120	13%	15	8%	135	12%	12%
Total Actions	N/A	770	N/A	215	N/A	985	N/A	N/A

Finally, if you know how many actions you are aiming to achieve in a month, and you know how many volunteers are required for each action, you can set goals for volunteer recruitment. If one tabling event required four volunteers to meet the action goals, then for each tabling event, you should set a goal of recruiting and confirming at least four people. There is also always the potential for people to not show up, so aim to recruit more volunteers than you need.

Data Reporting

Ongoing reporting will help monitor the health of programs (activity, volunteer, growth, relationship development) and track progress to goals. This should inform whether your campaign actions are effective, if your recruitment tactics are working, or if you need to switch course. Even if you don't have the capacity to do daily monitoring, weekly or monthly reporting on your activity can be informative and keep your programs on track to success.

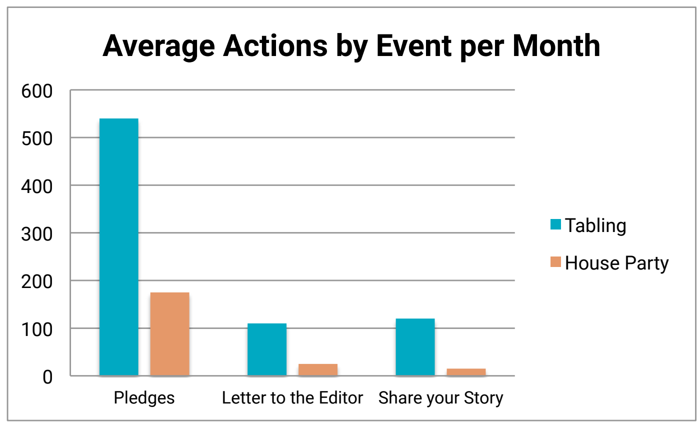
Reports can be generated by your database, but can also be kept in simple tools like Excel or even Google Sheets so they can be shared with various team members.

In the goals section above, there are examples of how to report on your goals. In addition to goals, it is important to report on the growth of your list over time. Weekly or monthly reports on the number of new people at each level of the organizing model will help you see how people are moving up the ladder and how quickly. These reports can be automated to reduce the burden on data staff.

All individuals on your list should be tagged with the actions they take, to allow for reporting on the number of actions taken as well as the type of actions taken, and by whom. These reports will help refine your outreach strategy by showing which actions are more popular than others.

Regular reporting creates increased transparency and accountability around the organization. If everyone is looking at the same numbers on a weekly basis, there will be no confusion around how programs are working and which goals are being met. This will allow for constructive conversations around the effect of the program, resource allocation and future goals.

Information from the tables above can be represented in a number of ways, for example a side-by-side bar chart does a nice job displaying event data by month.



For building your team of volunteers, you can represent the growth in each role visually as well, using a model like a line graph that shows progress and growth over time.

These reports can be shared easily at weekly meetings to ensure that everyone is on the same page and working from the same information.

Digital Segmentation

Data doesn't only help with goal setting and volunteer management, it can also help with email. If you are running a mass email program, it's important to speak to your volunteers in a nuanced manner. To do this, it's important to leverage profile tags to segment your lists.

Don't overdo it: not every email message needs to be different. However, acknowledging past actions is one of the best ways to encourage future actions. Use the mass email program to thank volunteers at the end of the year, or give them exclusive organizational updates.

Conclusion

With this toolkit you now have a clear pathway to start planning or growing your volunteer program. We hope you will use this manual to work with your staff and existing volunteers to discuss best practices and begin to adapt them to meet your specific needs and goals. Furthermore, you will also find training material, resources and worksheets in the appendix.

Remember it takes time to build relationships and develop a strong program. As your program continues to grow and develop, you can always refer back to this manual to set new goals or find new ways to adjust your approach to engagement. In addition to this manual, remember the resource you have in learning from other SIP states and the National Institute of Reproductive Health.

Appendix

Appendix

In this section you will find worksheets to help train your staff and volunteers. These tools will help you to implement and put into practice various tactics in building and sustaining your volunteer program. Tools include:

Strategic Framework
Develop your Mission, Goal, Strategy, and Tactics to outline your strategic framework for your upcoming campaigns

Campaign Planning Guide
Staff can use this guide as an outline for your campaign plan, providing the key sections and critical questions to answer

Organizing Fellow Job Description
Adding capacity through internships and/or fellowships

Volunteer Roles
Brainstorm the types of volunteers and possible participants to help you meet your organizational goals

Volunteer Development
Set goals for your volunteer growth at different levels of participation and think through the activities that will support this growth

Holding Effective One-on-One Meetings
Train new organizers and volunteer leaders on how to hold an effective one-on-one

Sample Volunteer Recruitment Conversation
Share with staff and volunteer leaders who will be recruiting new volunteers

Best Practices for Making an Effective Ask
Share with staff and volunteer leaders who are making the hard ask of volunteers

C3 Volunteer Actions and Tactics
Keep your volunteers active and engaged with a variety of c3 activities

C3 Volunteer Digital Activity and Tactics
Keep your volunteers active and engaged online with c3 activities

Volunteer Sign Up
Make sure to sign up volunteer prospects and recruit them for volunteer activity

How to Host a Great Phone Bank
Train a volunteer leader to host a successful phone bank

Phone Bank Guide
Best practices and guidance for phone banking volunteers

Call Tally Sheet
Tool to track recruitment calls from a phone bank

Guide for Planning Events
How to choose a venue and enlist the help of volunteers in making your event a success

Event Checklist
Share with organizers and volunteers who are planning events

House Party Host Guide
Guide for volunteers hosting a house party to walk them through planning and execution

House Party Checklist
Share with a house party host to make the event successful and stress free

House Party Attendee Brainstorm List
Use this prompt to generate an invite list for volunteer house parties

Small Business Outreach Plan
Volunteers and staff members can use this guide for new membership and partnership development through local businesses

Training Best Practices
Staff and volunteer leaders should use these tips to make trainings effective and interactive for participants

Digital Best Practices
This one pager can be used with staff taking on digital work or with those who volunteer to be your digital lead

Data Tips
Make sure you track the right information to inform your programs

Strategic Framework

Mission

Goal

Strategy

Tactics

Campaign Planning Guide

Use this guide to assist you with writing your campaign plan. This template includes key questions and items you should consider as you are developing the respective sections of your plan.

Initial Assessment

Start your campaign plan by providing background on the environment. Provide a landscape analysis and identify what resources you have to work with.

1. What problem are you trying to solve?
2. What is the current environment (public perception, competing campaigns)?
3. What are your resources (staff, funding, volunteers, partners)?
4. Who are your targets, allies, opposition, and who will you need to persuade?

Strategic Overview:

This section of the plan should provide a high-level view of the approach you are taking to your campaign.

1. What is your theory of change?
2. What is your strategic framework (mission, goal, strategy, tactics)?

Core Message Frame And Narrative:

Detail the core message frame and narrative that your team will amplify throughout the campaign. Remember that while your campaign will further tailor this message for specific audiences, every message your campaign employs should fall within this frame.

1. What is your core message frame (this should be no longer than a few sentences)?
2. How is this message tailored to your target audience and how will you test this message?
3. Who will you engage to validate and amplify your message with your target audiences?

Organizational Structure

As you develop your organizational structure, you should have a firm grasp of what your goals are for respective grassroots, digital, communications, and political (grasstops) programs. Your organizational chart should delineate roles, responsibilities, and reporting based on the human resource capacity you will need (and can afford) to meet those goals. Include any organizing model you will use for volunteer capacity.

1. What is your organizational chart?
2. What are the responsibilities of each staff member and volunteer?

Phases And Timeline

This section should include a campaign calendar that clearly displays the phases and key benchmark dates of your campaign. As you develop timeline you should consider the overall campaign goals, external factors that are outside of your control, as well as internal factors that are in your control. Each phase should account for the various departments participating in the campaign (organizing, communications, digital, political, etc).

Be sure to set specific dates for hard launch and end dates of each phase, keeping your internal and external calendar in mind. Finally, be sure to include benchmarks toward all of your overarching campaign goals (for example: 25% to petitions collected goal, 50%, 75%, etc.).

1. What are the first steps we need to achieve to run a successful campaign? Do we need a capacity building phase to recruit and train volunteers, develop partners, and secure other resources?
2. What do you need to do to persuade and educate your target audience and to create change?
3. What steps need to be taken to mobilize your informed and supportive target audience to create change?

Budget

The following questions should be considered as you create your spreadsheet campaign budget.

1. What are the budget implications for staff and hiring? (if applicable)
2. How will you determine which line items need more or less funding, in accordance with the priorities of your timeline and achieving your goals?
3. What systems and tools will you use to effectively monitor and track your spending?

Organizing Fellow Job Description

Position Description:

(Your organization) is running a campaign across the state to educate and engage individuals around reproductive freedom. We are seeking highly motivated individuals to serve as Organizing Fellows. Organizing Fellows will be based in (City) and have an opportunity to gain hands-on organizing and issue advocacy experience under the supervision of experienced staff. Fellows will help coordinate field activities, assist with recruiting and managing volunteers, and plan events.

Responsibilities:

- Support staff with planning events and executing a range of field activities
- Help recruit and manage volunteers who will participate in activities like phone banking, educational events, and trainings
- Meet volunteer contact and recruitment goals
- Help the staff input data and maintain data integrity

Qualifications:

- A strong commitment to the overall goals of (Your organization) and reproductive rights
- A desire to learn and a willingness to receive feedback
- The ability to communicate clearly
- The ability to be self-motived and goal oriented

Commitment:

- The internship requires a (12-16) week commitment. The fellowship is part-time, with weekly hours that are negotiable.

Compensation:

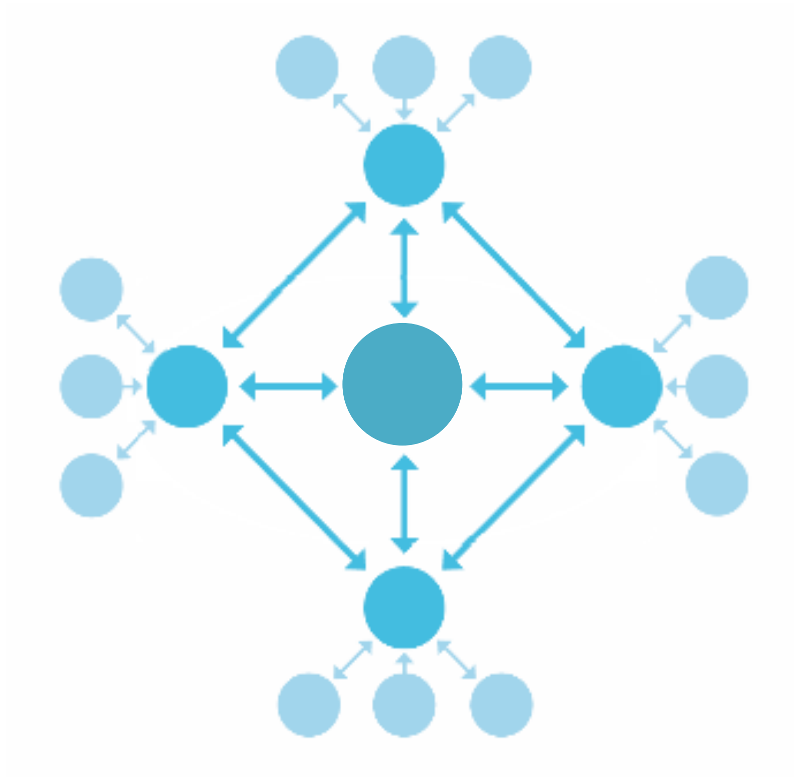
A monthly stipend is available.

[OR]

We are not able to offer a salary or hourly pay for fellows, however, we are happy to help you earn credit hours through your university or qualify for a work study program.

To apply: Please email a copy of your resume and a cover letter to XXXXX

Volunteer Roles



Volunteer Manager (staff or volunteer leader): ______________________

Team Role:	Possible Team Member:
______________________	______________________
______________________	______________________
______________________	______________________
______________________	______________________
______________________	______________________

Volunteer Development

How can you build your volunteer program over the next four months? What are the measurable goals that can attach to your timeline milestones?

GOALS

What activities will move supporters through the volunteer ladder? Remember to:

1. Identify recruitment activities
2. Outline activity to build relationships
3. Create ongoing activities to engage volunteers

Month 1

Month 2

Month 3

Month 3

Holding Effective One-On-One Meetings

Know The Three Types Of 1:1s

1. Introductory:	Establish relationship and make a personal connection. Gage potential for leadership. Activate!
2. Maintenance:	Check in with potential leader; Troubleshooting and debriefing challenges; Incremental transfer of responsibilities
3. Escalation:	Confirm a volunteer leader in their role

Tell Your Personal Story

Remember the structure:
1) Challenge, 2) Choice,
3) Outcome, 4) Ask

Remember that personal stories change based on time and audience

The best stories are responsive and model action in the face of adversity

Always Make Hard Asks

ACTION ASKS	TEST ASKS	ESCALATION ASK
Attend a house meeting	Host a house meeting	Lead a training
Attend a phone bank	Host a phone bank	Become a team leader
Make a list of volunteer prospects and contacts	Lead a phone bank	Become an advocacy lead
Collect petitions	Host a petition drive	Become a recruitment lead
	Lead a petition drive	

Implement Best Practices

- Provide specific times to meet (ex. “Can you meet this Tuesday at 2:00pm”)
- 30-40 minutes, never longer than 1 hour
- Connect on values and shared experiences
- Ask for insights
- Listen twice as much as you talk
- Always end with a hard ask and clear next steps
- Confirm one-on-ones the night before

Sample Volunteer Recruitment Conversation

Make an introduction [5 minutes]
Ex.: "I'm a volunteer with NARAL Pro-Choice NY and I have been volunteering with NARAL 5 years. I started working with NARAL to advocate for reproductive health and sex education."

Get to know the person – ask them questions about themselves [10 minutes]
Ex.: "What kind of involvement in the community do you have? What drove you to attend the NARAL event? What issues do you care most about?"

Connect on core issues and values [5 minutes]
Ex.: "You mention you are passionate about reproductive health because of the challenges you faced to receive reproductive health services on your college campus. I work with NARAL to engage college students around this issue. Your perspective could add a lot to the conversation."

Share your personal story [10 minutes]
Present a challenge
Ex.: "I became really frustrated with my own experience and the lack of resources around teaching young people about sexual health in my community."

Present a solution (volunteer = solution)
Ex.: "I began looking for ways to get involved. NARAL gave me opportunities to get involved by conducting information sessions for high school and college students."

Make a specific ask [5 minutes]
Ex.: "Can I count on you to engage college students? Are you available to help me table at NYU next Thursday at 2:00 pm, a group of volunteers are gathering to recruit students."

Review next steps [5 minutes]
Ex.: "Great- I will call you Wednesday to confirm and look forward to seeing you on Thursday."

Best Practices for Making an Effective Ask

Never apologize for asking

- Volunteering is an opportunity, not a favor.

Be specific

- Present the prospect with limited concrete options.
- Don't ask people if they want to "volunteer" without a specific date. It's a waste of a phone call.
- This translates online, too, although sometimes in a mass email it is okay to ask people to generally "Sign up to get involved." Know your audience and remember if you're trying to move people through the ladder of engagement, to be as specific as possible. Always be specific when asking for money. What is the specific amount of money you need the person to give? Ask for that.

Limit the possibility of "no"

- Something happens in people's heads when you ask an 'or' question rather than a 'yes/no' question—and they're more likely to say "yes."
- Online, limit the possibility of distraction: ask for one thing only, and allow them to take that action. Need them to come to a house party? Only link to the RSVP page. Don't provide other links in the email that could be distracting.

No one wants to go to a poorly attended party

- Create buzz around your event! Talk about your exciting, fun, well-attended event–not the event you "desperately need help at."

Keep asking

- Always have an alternative.
- If someone cannot attend your event on Tuesday or Thursday ask when they are free. Or find an activity that they would rather do.
- Online, vary the asks. If you keep asking your list to attend events and nobody is signing up, start with a "Share your story," or "Share this on social" ask to warm them up.

Create a sense of urgency

- Explain why it is important for them to volunteer with you now.

Pause

- Make your ask and wait for a response. Do not rush to fill the silence.
- Pausing gives your prospect a chance to think and the human tendency to fill the silence may help influence their answer.

Practice

- Making effective asks can be nerve-wracking at first. Practice with other staff and volunteers to make sure you feel comfortable following these guidelines.

C3 Volunteer Activity and Tactics

It can be difficult to find activities and actions for volunteers outside of the traditional political, electoral and c4 asks. However, to keep volunteers engaged year round, it's necessary to have other actions and asks that still work toward your goal. Below, we've provided some c3 actions that will help you recruit prospects and engage potential volunteers.

ACTION	EXAMPLE
Phone Banking–The most efficient and accessible way to contact potential volunteers. Talking directly to people can make a huge impact on their knowledge of important issues and their willingness to mobilize on behalf of those issues	Volunteer recruitment phone banks Issue education phone bank
Social Events–An excellent opportunity to show appreciation to your current volunteers and get your prospective volunteers fired up about your organization's issues and reproductive rights. It can also be a way to introduce a prospective group of volunteers to the organization, with the goal of building community and connecting with the organization in a less formal manner	Happy hours Young professional events Trivia night Book clubs House parties Story collection party Watch parties Data entering party
Educational Events–Are great to help keep volunteers engaged, informed and knowledgeable about reproductive rights and abortion issues	Speaker series Panel discussion Film screenings
Trainings–Using a train the trainer model, trainings provide an opportunity to help volunteers develop new skills	Insurance access training Sexual health training Sex educator training Recruitment training
Tabling–Tabling at events is a great way to spread the word about your organization and issues as well as connect with the community and recruit volunteers	Farmer's markets Community events Concerts Fairs Colleges and universities
Office Support–For volunteers who want to engage with lighter actions and have availability during the work day	Data entry Mailing direct fundraising asks General office support

C3 Volunteer Digital Activity and Tactics

Creatively leveraging digital tactics is an effective way to keep supporters and volunteers engaged year round. Below, we've provided engaging actions and capacity building asks. These c3 actions will help you recruit prospects and engage potential volunteers.

ACTION	EXAMPLE
Observer–In this set of actions, you are providing content to supporters. The only thing you should expect from them at this point is to read and/or watch provided content.	Read an email View social accounts Tune into a live stream
Follower–In this set of actions, the supporter is choosing to subscribe to your organization online – through an email list, social account, or SMS. It's important that your organization is providing supporters these opportunities actively, and not passively relying on supporters. Finding creative ways to ask this is important – asking people to "subscribe for emails" does not test well!	Add your name to stand with [ISSUE/PERSON] Sign a [BIRTHDAY/THANK YOU] Sign a petition Text NUMBER to stand for [ISSUE] Find us on social for your chance to win [INCENTIVE/PRIZE]
Public Endorser–In this set of actions, the supporter shares their support of your organization to their friends, family, and online networks.	Share on Facebook (a specific post, or tagging friends) Retweet on Twitter Tag friends in an Instagram post Use a common hashtag Forward an email to a friend
Contributor–In this set of actions, the supporter will contribute their thoughts, their money, or their time to your organization.	Share a story Take a survey Participate in a Twitter Town Hall Post in a Facebook Q/A Comment in a Reddit Ask Me Anything Donate
Activist–Don't underestimate the power of your supporter network and online actions. Volunteers can take meaningful actions that help move the needle on organizational goals.	Make calls online for volunteer recruitment/issue education RSVP to an offline event Recruit friends to events Recruit friends to be donors Host and promote a grassroots fundraising page Attend issue education webinars

Volunteer Sign Up

JOIN US!

FIRST NAME	LAST NAME	PHONE	EMAIL
STREET ADDRESS	CITY	STATE	ZIPCODE

☐ CHOICE TRAINING ☐ HOST A HOUSE PARTY ☐ RECRUIT YOUR FRIENDS

FIRST NAME	LAST NAME	PHONE	EMAIL
STREET ADDRESS	CITY	STATE	ZIPCODE

☐ CHOICE TRAINING ☐ HOST A HOUSE PARTY ☐ RECRUIT YOUR FRIENDS

FIRST NAME	LAST NAME	PHONE	EMAIL
STREET ADDRESS	CITY	STATE	ZIPCODE

☐ CHOICE TRAINING ☐ HOST A HOUSE PARTY ☐ RECRUIT YOUR FRIENDS

FIRST NAME	LAST NAME	PHONE	EMAIL
STREET ADDRESS	CITY	STATE	ZIPCODE

☐ CHOICE TRAINING ☐ HOST A HOUSE PARTY ☐ RECRUIT YOUR FRIENDS

FIRST NAME	LAST NAME	PHONE	EMAIL
STREET ADDRESS	CITY	STATE	ZIPCODE

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How To Host A Great Phone Bank

Thank you for volunteering to host a phone bank. Your work directly impacts our ability to grow our number of supporters. Phone banking is the most efficient and accessible way to contact potential volunteers and supporters. Talking directly to people can make a huge impact on their knowledge of our organization, upcoming events, and their willingness to get involved.

This guide will walk you through the steps of a phone bank to make sure you and the volunteers on the phones have great success.

Preparation: Venue, Recruitment, & Materials

When choosing a venue for a phone bank, do your best to find a private, quiet place. A room with tables for volunteers to use and places to spread out are helpful. A conference room, large living room, or library meeting room would all work well.

With a location and date locked down, start the recruiting process to get volunteer phone bankers. Encourage the volunteers to bring a friend and always make sure to call them and confirm their participation the day before your phone bank.

On the day of bring call lists, printed scripts and phone banking guides for all participants. Don't forget pens so volunteers can write notes and make edits to their script. Have a sign in sheet prepared and make sure all volunteers sign in at the beginning of the phone bank; this will help when you follow up to thank them for their participation and encourage them to volunteer again.

Ask all phone bankers to bring a fully charged cell phone to use, but bring any extra chargers you have. Encourage them to bring laptops if you have a phone tool that will let them access their call list online and do automatic data entry.

Phone Bank Agenda: Training & Debriefing

A group phone bank should be about three hours. Do your best to have the phone bank on a night or weekend- your volunteers will have a better contact rate and be able to use cheaper cell phone minutes.

Encourage volunteers to arrive on time and stay until the end so they can be a part of training and debrief. A phone bank agenda should allow for ample phone calling time:

- Welcome & Sign in (10 min)
- Training (20 min)
- Phone Calling (2 hours & 15 min)
- Debrief (15 min)

When training volunteers, begin by reviewing the importance of making phone calls. Then go over the script and best practices. Your most important task when training is to set expectations. Most contact rates for phone calls are between 10-20%. Make sure your volunteers know they will not have great conversations with everyone they call and encourage them to be proud of the connections they do make.

Spend time at the end of the phone bank debriefing. Encourage volunteers to share any lessons learned or best practices they discovered. Also allow volunteers to share a challenge they had, but make sure everyone shares a positive experience.

Encouraging Team Atmosphere

Make your phone bank fun! Provide food if possible and ask volunteers to bring a snack to share if they're willing. Think of this phone bank as an opportunity to build team relationships. Never underestimate the power of a fun first experience to encourage continued active participation.

Phone Bank Guide

Thank you for volunteering to participate in our phone bank. Making calls is the most efficient and accessible way to contact potential volunteers and supporters. Talking directly to people can make a huge impact on their knowledge of our organization, upcoming events, and their willingness to get involved.

You will be given a script to accompany your list of supporters. You will probably talk to somewhere between 10% - 20% of the people you call. Don't get discouraged–this is standard!

When you do not reach the person on your list, fill in your call sheet with the reason why (e.g., "not home," "refused," "wrong number," etc.).

When you do reach someone on your list, use the script, as it is helpful. Remember to focus more on holding a natural conversation than on following the guide exactly. Read through the script before making your first call and adjust it to fit your natural style. Throughout the conversation, pay attention to cues from the prospect and adapt accordingly.

Remember to:

- Introduce yourself to the person in a comfortable, conversational tone.
- Gleam key information from the person on the phone that will help you make better volunteer asks.
- Record this information onto your call sheets
- At the end of a call, thank the person for her/his time, hang up, and move on to the next call.

Not every phone call will lead to a great conversation–but your phone calls are the most effective way to recruit volunteers and supporters and every attempt is important.

A few tips and best practices for phone banking are:

- Be polite, friendly, and neighborly.
- Practice, practice, practice.
- Express genuine interest.
- Smile through the phone.
- Don't read directly from the script

Most importantly, have fun!

Call Tally Sheet

Caller Name: ______________________________

Date & Time: ______________________________

List Number: ______________________________

Thank you so much for making calls with us, please make sure to let us know how your calls went:

☐ **TOTAL NUMBERS DIALED**
How many numbers did you call?

☐ **TOTAL CONTACTS**
How many people did you speak to?

☐ **TOTAL EVENT ATTENDEES:**
How many people said they would attend the event?

☐ **VOLUNTEERS:**
How many people said they would volunteer in the future?

Guide For Planning Events

Events are great ways to engage volunteers and strengthen your outreach. Whether through a house party, phone bank, screening or information session, events allow volunteers and potential volunteers to build relationships, learn more about your organization and take action. To have a successful event it's important to choose the right venue, enlist the help of volunteers, and provide opportunities for potential volunteers to stay engaged following the event. In this section, you will receive best practices on planning for an event

Venue:

When choosing a venue for an event, aim for a space donated by a volunteer or sponsor. The location should be appropriate for the volunteers you want to engage and the amount of volunteers you want to attend. For example, if you were to host a screening, you would want a venue that has audio and visual capabilities to help you show your film.

Recruit Event Volunteers:

Volunteer events are great opportunities to train volunteers to take on more responsibility and test them for leadership. Volunteers can help in many ways from hosting the event, helping guests to sign in, facilitating a discussion, or even decorating the venue.

Recruit and Engage Attendees:

Call through your supporters to build for the event and encourage volunteers to share with their networks. Remember, each attendee is a chance to share your message and recruit a new volunteer. Make sure each guest signs in, and before they leave the event make a hard ask for them to take an action, such as attending another event or signing up for a volunteer shift.

Use the following tools to help make your event a success:

I. Event Checklist
II. House Party Host Guide
III. House Party Checklist
IV. House Party Attendee Brainstorm List

Event Checklist

Here is a sample event checklist. Use this to make sure you have everything prepared and in place for your upcoming events.

Master Event Checklist	Tracker		
TO DO	DEADLINE	OWNER	STATUS
Operations			
Set Event Date & Time			
Determine Budget			
Create Venue Criteria Checklist			
Research Venue Options			
Lock Venue			
Research Beverage & Snack Options (Remember to include cutlery, plates, cups, napkins, etc.)			
Place Beverage & Snack Orders			
Determine Tech & Supplies Needs (PPT clicker, projector, flipchart, markers, pens, microphone, etc.)			
Order Supplies			
Pack Supplies (Check that pack list is finalized w/ listening session team)			
Event			
Assemble Event Team			
Finalize Skeletal Agenda			
Identify Section Speakers			
Finalize Annotated Agenda			
Finalize Materials Pack List			
Send E-Mail Reminder to Speakers (call-time, parking details, what to bring, last minute notes/changes)			
Send Reminder to Participants or Make Confirmation Calls			

House Party Host Guide

House parties are useful recruitment and organization building tools that allow you to leverage your own personal networks to recruit, train, and activate volunteer leaders and volunteers. Volunteers can organize and execute house parties with their own friends and family. Not only do they get to have fun with friends, but friends can help them reach their goals of volunteer recruitment.

House Party

Here's how to get started:

House Party Preparation

To prepare for your recruitment house party, follow these steps:

1. Set recruitment goals for the house party.
   I want ________ people to attend.
2. Develop your invite list. Use the Host Attendee Brainstorm and remember, your list should be at least twice as large as your recruitment goal.
3. Invite your list with phone calls and emails.
4. Gather any materials you need: Program intro sheet, commitment sheets, scripts, list of events, pens, sign in sheets, etc.
5. Develop an agenda and training plan.
6. Confirm your guests' attendance the night before.

Sample Recruitment House Party Agenda

Once you follow these steps, you are fully prepared to host a successful house party. Below is a sample agenda to follow during your house party:

- Guests arrive and mingle (10 min)
- Welcome and introductions (5 min)
- Tell your personal story (5 min)
- Have attendees share why they came (10 minutes)
- Make an effective volunteer recruitment pitch and collect commitments (5 min)
- Provide a volunteer training (20 min)
- Clarify next steps: (5 min)
  - Clarify outreach timeline
  - Schedule next volunteer opportunity

Follow Up

The day after your successful house party, follow up with all attendees and recruited volunteers. Thank them for attending and clarify next steps.

House Party Checklist

Host: ____

Attendence Goal: ____________________________________

PRE-HOUSE MEETING

	COMPLETED?
Secure house meeting location	
Recruit attendees	
Prep sign-in sheets and materials	
Prepare training	
Set possible dates for next event	
Confirm attendees	

DURING HOUSE MEETING

	COMPLETED?
Sign-in attendees	
Introduce meeting	
Talk about your organization	
Run planning for next event	
Schedule attendees into next event	

POST-HOUSE MEETING

	COMPLETED?
Report to staff & share sign-up form	
Thank you email with details for next event	
Follow up one-on-one with attendees	

House Party Attendee Brainstorm List

Think about the friends, family, colleagues, neighbors, and acquaintances in your circle who support reproductive rights and who might be great volunteers. Use the space below to make a tentative invitation list for your house party. Remember, about 50% of the people you invite will actually attend. It's good to invite a lot of people just in case!

Also remember that an email is never enough. If you are going to email your invitations make sure to follow up with a personalized call. Then call the friends who have said "yes" an additional time the night before the house party to make sure they're set to go.

Invitees				
Name:	Phone:	Email:	Invited?	Confirmed?

Small Business Outreach Plan

As organizations seek to strengthen relationships in their community and build a volunteer base, it's important that they include small business outreach as apart of their plan. Small business outreach can help your organization to spread the word of your work and mission, support you as a sponsor at an event, and connect you with potential volunteers. This short guide outlines how to engage small businesses to help your program grow and meet your volunteer recruitment goals.

Step 1: Finding the business

Start with a relationship

There may be several businesses you want to engage. Start by creating a list of businesses that you or your volunteers have a relationship with, even as a customer. This could be the local restaurant that caters to your office, the beauty shop you or your colleagues frequent, or perhaps a business that one of your supporters own.

Build a relationship

For businesses where you do not have a relationship you should first select your targets. These should be businesses that cater to the same audience you are trying to reach. Because you both value this group, you have a shared interest and common ground that highlights why you could both benefit from a partnership. Good examples of these businesses include: nail salons, beauty shops, hair salons, locally owned cafes and restaurants. You can also take a small poll of your volunteers and staff to discover what businesses they visit most.

Step 2: Engaging the business

Once you discover which business to reach, you should then be prepared to make your ask. Start by visiting the business and arranging to speak with a manager and/or owner. You can have a script prepared, or talking points, to discuss your organization, and your conversation should be similar to a mini one-on-one (see one-on-one worksheet).

What to say

Prepare a script introducing yourself, explaining your role and how you interact with the business; you should share the mission of your organization and see if you can establish a shared interest in supporting women. From there, make an ask that you feel would most benefit your organization and program. Whether that is asking for them to keep a pledge, share materials, or host volunteer events.

Step 3: Promoting your cause

As mentioned previously, there are several ways a business can help with your work, below are a list of ways you can ask a manager or business owner to support you.

Pledge cards

You can ask a business owner or manager if you could leave pledge cards and a collection box for supporters who are interested in getting involved. A volunteer or staffer would be able to pick up cards weekly and maintain the relationship with the business.

Host events

You can ask to host an event at their location, which can be a great opportunity for them to build their clientele. For example, you can host a beauty night at a salon where new volunteers can receive services and learn about your organization.

Event Sponsorship

You can ask them to sponsor an event or donate goods, which will help them to build brand loyalty and gain visibility.

Store canvassing

Visit their business and speak with customers who are interested in learning more about your organization.

Education

You can also ask to present, share or leave educational material.

Conclusion

These are the first steps to engaging with small businesses, however, in the same way that you maintain a relationship with a volunteer you should also maintain your relationships with them. You can do this through ongoing communication or through building out a small business ladder of engagement. Keep in mind managers and staff of small businesses can also be potential volunteers. Lastly, make sure to train your volunteers and colleagues on small business outreach. Every business can be an opportunity not only to reach your recruitment goals, but also create culture change by shifting the stigma attached to reproductive health and abortion rights.

Training Best Practices

Training is a key component to the effectiveness of your work. Training volunteers is a great way to equip them with the skills and knowledge to meet your goals, whether your training volunteers on messaging, hosting a phone bank, tabling at an event, or entering information into your database. Learn best practices to strengthen your trainings with these tips.

Before the training:

1. Establish goals, audience, and location
2. Assemble training team of staff and volunteers
3. Develop a skeletal agenda
4. Do a dress rehearsal—Practice your training
5. Train!

During the training:

During the training you will want to model the action or skill you want your trainee to develop by using an I do, we do, and you do model.

	TRAINER	TRAINEE
I DO	Establishes goals/purpose Gives directions Models Thinks aloud	Read an email View social accounts Tune into a live stream
WE DO	Interactive instruction Checks in with trainee Prompts, gives clues, checks Additional modeling	Asks & responds to questions Completes w/ trainer Repeats back key steps
YOU DO	Watches & evaluates Gives feedback	Completes process independently Collaborates with peers Prepares to train others

After the training:

Volunteers should put their training into practice. As a leader, you should follow up with the volunteer to make sure they feel comfortable with what they were trained to do, and ask for feedback on your training.

Lastly, training is ongoing, remember to continue to work with volunteers who you have trained, to keep them engaged and brushed up on their skills.

Digital Best Practices

A digital program can help you:

- Build for an earned media event
- Build your list of potential volunteers
- Engage your core supporters
- Raise money to fund your events
- Meet your strategic goals

We like to think of these in four buckets: Messaging, Acquisition, Organizing and Fundraising. See below the best practices for each bucket of your digital program.

Messaging

Digital is all about taking your core message frame and delivering it to your audience.

- Online you get to control the message and tell your own story. If you don't tell it someone else will or it won't get told at all.
- Use messaging as an opportunity to define your opponent
- Be diligent about defining your message and sticking to it.

Acquisition

Reach more people and build your list. A digital program uses the following tools to help you acquire new members.

- Sign up form on website/splash page: All websites should have a very simple sign up process that includes fields for an email address and geographic location (zip code).
- Online petitions: Asking people to "add their name" or "stand with us" is a simple way for users to get involved in the community. It is low-commitment, but provides you with their email address.
- Paid Ads: Paid digital advertisements are a good way to get email addresses, but it's important to invest in quality over quantity.
- Pledge cards: Collect email addresses at offline events.

Organizing

There is no online organizing and offline organizing. There is just organizing.

- Remind people why it matters: When organizing online tactics can seem meaningless, it's important to explain to your audience why taking an action matters.
- Moving people from online action takers to offline action takers is one of the biggest challenges in organizing. Be intentional about building a digital ladder of engagement to get people to take small actions and grow their commitment over time
- Effective programs meet people where they are and lead them to take incrementally larger actions over time.

Fundraising

Fundraising online can be one of the largest sources of money.

- Active Fundraising–Making a hard ask in an email or a website: "Please donate to our organization."
- Passive Fundraising–Making an "accidental ask" which could include a donation page in a daisy chain.

Digital tools:

Infrastructure, website, email, SMS/Text and social media are the digital tools you can use for messaging, acquisition, organizing and fundraising.

Infrastructure

When starting out, or when you're looking to improve your digital program, ask yourself if you have the tools to get going.:

- Do you have a place to host and edit a website?
- Do you have a place to send emails?
- Do you have a program to send SMS/text messages?

Website

Websites do not have to be complex.

- If you are running an email program, it should have email capture.
- If you are running a SMS program, it should have phone number capture.
- At the very least, state your mission and provide a way for the user to get involved.

Email

Email is one of the most versatile tools we have at our disposal. It's an incredibly powerful organizing and fundraising tool if used appropriately

- It can get messages out quickly
- Explain complex issues in-depth
- Move users to action right away

SMS/Text

With SMS programs, you are able to reach more people more quickly.

- SMS and text messages are read immediately and reach a diverse and broad audience.

Social Media

Social is not only a powerful tool, but it can also be a fun program for your organization.

- Be intentional about crafting your message specifically for the social media outlet. Consider putting together shared-graphics and other material to be shared online.

Data Tips

To run an effective data program it is important to track the right information. Each piece of supporter data you collect not only shows how they have been involved in the past, but can also indicate how they want be involved in the future. We recommend tracking two buckets of information: demographics and activity.

Demographic Data:

You don't have to collect all of this information in the supporter's initial sign up, but you can grow their profile as you develop a relationship with them. We recommend starting with name, email, and zip to be able to connect with the person and have the basic ability to segment your communication by geographic location.

- Name
- Email
- Address
- Phone
- Sign up date

Additional demographic information: Collecting these data points can help you better understand your supporter base and make sure you are connecting with the right audience.

- Issue interest
- Age
- Gender
- Race

Activity Data:

Tracking how your supporters have interacted with your organization can inform the asks you make and help you move someone up the ladder of engagement.

Online actions: Track your supporters online activity from signing a petition to sharing an email with a friend, it will help you segment the list and make the right ask

Donations: Keep track of how they donated (online or offline), the frequency of their donations, and the level of their donations

Volunteer level: If you have ladders of engagement for volunteers tag your volunteers' level

Volunteer activity: Track what volunteer activity (type and date) completed by your volunteers, including canvassing, phone banking, house parties, tabling, office work, etc.

Event attendance: Track participation in unique events, if someone has been actively attending all of your educational events you may want to make a volunteer ask based on this interest

Trainings: Know what trainings your volunteers have gone through so you can continue their development and utilize their skills