



Best Practices for Management of Volunteers

Overview

What are the three most limited and valuable resources in campaigns?
PEOPLE, TIME and MONEY.

Too often in modern campaigns the role of volunteers (PEOPLE) is undervalued and therefore volunteers are under-utilized. In fact, a campaign usually cannot pay enough people to get done all that needs to be done.

We hope this article will set realistic expectations of the campaign's use of volunteers and give volunteers and activists an idea of the roles they might fill in a campaign. It will talk about how to recruit and retain the volunteers you need.

Recruiting political volunteers isn't easy, but it can be done. Use the suggestions in this article to help you grow your own volunteer network. And remember, every volunteer you recruit now and treat well is a volunteer will be there to help the campaign the next time around.

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- B. 5 Best Practices for Volunteer Recruiters/Coordinators
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Why Do People Volunteer For Campaigns?

Understanding why people volunteer will help you to increase your chances of motivating them to volunteer. Understand their needs or values (reason for volunteering) before matching them to the task(s) at hand. Creating a positive volunteer culture around the campaign will go far beyond the victory party.

On the other hand, people are reluctant to volunteer because it is too hard, they don't want to embarrass themselves, they won't be supported, or assume they won't make a difference in the outcome of the election.

Treat each person as an individual. Try to understand them. Although volunteers work without pay, they do it to receive something – no one does things for no reason.

Why Do People Volunteer For Campaigns?

Smart campaign managers/staff realize people volunteer for different reasons. Your group of seven volunteers could have seven different reasons for volunteering. Some reasons that people might be willing to volunteer include (no order of importance):

- Someone asked them. Most people respond when someone tells them they're needed. Many people wait for someone to "ask them" to volunteer. All campaign managers/staff need to remember this and "make-the-ask."
- They are motivated by their values or view of the world – because of religion, ethics, equity for women and ethnic groups, politics, philosophy, etc. – to try to improve the quality of life in their communities. Values are different between the different generations. Common values for "Baby Boomers" may not be held by "Millennials."
- They seek the external recognition and internal good feelings that may come with volunteering. They get some personal benefit out of it.
- It is social experience and gets them "out of their houses."
- They are interested in a specific a policy or issue.
- They want to meet like-minded people.
- They are looking for a job and are seeking a reference for future employment.
- They are party loyalists and will work for the candidate.
- They care deeply about the issues your campaign (organization) addresses, and/or about social change.
- They have personal experience of the effects of your organization's issues and want to do something about them.
- They feel a need to pay back society for help or opportunities that were extended to them. They have untapped skills that they can use by volunteering with your organization.

- They want experience and/or training in your field of work. They might want to try out the work to see if it's a career possibility, or they might want the experience as a credential for another kind of job.
- They actively enjoy the kind of work that their volunteering entails: it's fun for them.
- They enjoy the social situation, and value the contacts with other volunteers, participants, and staff members. This is often true for people who don't work outside the home, and don't have the daily social contact that such work brings with it – seniors, stay-at-home parents, etc.
- It makes them feel needed and useful.
- They are related to the candidate. The family connection motivates them.
- They are friends of the candidate. A prior friendship motivates them.

5 Best Practices for Volunteer Recruiters/Coordinators

1. Understand the Volunteer's Perspective

Too often the campaign views volunteers as "just another body" to do a task." We need 25 people to canvass a turf. The perspective is one of the campaign (or candidate) first and you (the volunteer) last. This is a "campaign centered" approach. This short-sighted approach creates a risk that volunteers won't return a second time.

Smart campaigns take a "volunteer centered" approach. Consider the needs of the volunteer first before matching them to campaign tasks. People need to feel respected and valued when they go home.

Realize that time is a gift to your campaign. It is just as important as a donation!

Campaigns need to consider why are people volunteering? What values or issues are motivating them to say "Yes", I'll spend my time for the campaign or this candidate?

Look at the campaign through the eyes and feelings of the volunteer. Were you ready when they arrived? Were they greeted effectively (or given the fast shuffle)? Were they introduced to everyone? How do they feel at the end of the experience? Did they feel valued or just another "cog" in the campaign machine.

Allow opportunities for volunteers to express their opinions or share their feelings. A best practice is to include some sharing time at the beginning of a shift and immediately after the completion of a task. One to two minutes per person can go a long way towards building a “respectful” relationship.

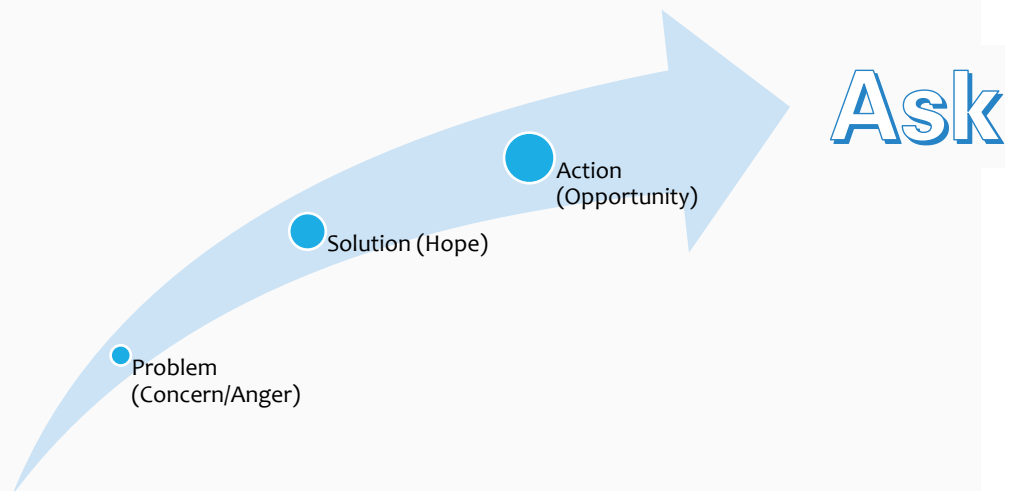
Keep in mind many paid staff come across as the expert on campaign topics from A-Z and have condescending attitude towards volunteers. They fail to realize that many volunteers have extensive professional experience that is applicable to the campaign. Also, volunteers have local knowledge of townships or neighborhoods.

Don't give a new volunteer an unrealistic goal or task. It is better to give them a turf list of 25 houses that they can complete in the shift. Avoid giving a volunteer a turf of 50 houses and then realize they completed only 26 houses-an unfinished turf. It is better to have the volunteer feel they completed a task and accomplished something. An unfinished turf can feel like a lack of accomplishment.

2. Make an Effective Ask

How you ask someone to be a volunteer is vitally important. An effective “ask” doubles your chances the volunteer will say yes.

Use the **PSA** approach to make an “ask.”



A. Problem

Talk with the person to identify a problem that causes them deep concern or anger. This must be about them and their needs. Don't try to sell them on your issue. People can “sense” a sales job and will resist your request.

B. Solution

You are not necessarily looking to directly solve the issue or problem. Pivot the discussion to how our candidate agrees it is a problem and will help solve the situation once elected.

C. Action

After the person agrees to a problem, mention you are offering an opportunity to do something about it. Do your best to communicate urgency that we all need to act now to create change.

D. Ask

Now make your ask. Make it specific and tie it to the issue or problem (not the candidate). Avoid general language like, "Can we count on you to volunteer for our candidate?" Better language: "Can you join us and address equal pay for women by working for one to two hours on Saturday from 1:00 p.m. to 3:00 p.m.?"

3. Train Volunteers Effectively

Remember: Better Training Equals Better Results.

When training volunteers, realize that a "one size" fits all approach doesn't effectively engage and energize volunteers. Adjust the time and level of the content to match the needs of the new or experienced person.

Too often the trainer wants to shorten the "training-time" so people can start making calls or canvass a turf. This doesn't support "first time" volunteers. Realize "first time" volunteers will need more training and a longer period.

Experienced volunteers may only need a 5-7-minute orientation.

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| The trainer hasn't trained, until the learner has learned! |
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a. Start with introductions. Invite each person to introduce themselves by name and respond to an open-ended question (Example: What is an important issue for you?). Use only 1 to 1.5 minutes per person.

b. Use 2-3 minutes to brief volunteers on the big picture. Start with an overview of where you are now in the campaign-support ID activities vs. GOTV tasks. This is often overlooked.

Mention the overall goal is to get our supporters to the polls in greater numbers than the opponents. Remind volunteers this is not a popularity contest.

Discuss why the campaign collects information and records it on paper and a database. Explain the difference between: 1) supporter identification, 2) persuasion contacts, and Get Out The Vote (GOTV) contacts.

Use large job aids like posters or flip charts to give learners a “visual” aid. Keep visual aids available for reference later. For example, post a flip chart (explaining the phone bank codes) on a wall for phone bankers to see.

Remember adults can only handle a limited number of “learning points” in a short time frame like 15-20 minutes. When conducting short presentations, focus on major points. Save minor details for job aid reference sheets that volunteers can use later. Let volunteers ask questions rather than you overwhelm them with tons of details. Give them job aids (created prior to the training) for reference.

When leading phone banks, trainers need to follow up with new volunteers about 5-10 minutes after the training to see if they have questions. Always provide compliments and encouragement to volunteers during the shift.

4. Recognize and Appreciate Contributions

The recognition and appreciation of volunteer time is vitally important. Volunteers need to feel the appreciation and sense that they made a contribution. They literally need to “feel” this when they walk out the door. Expressions of appreciate as best when tied to the experience or immediately thereafter.

The personal connection with the volunteer starts when they walk through the door. There is no substitute for a sincere greeting and departure.

Sincere departures include a chance for the volunteer to express their thoughts and feelings about their experience. An ideal situation is for each canvass and/or phone bank to conclude with a 5-7-minute debriefing. Smart coordinators will give sincere compliments

A verbal “thank you” and compliments are a must during departures. Everyone, no matter how small the time or contribution deserves a thank you. Magic words include thank you, appreciate, and grateful.

Seeing the good in others has a powerful benefit. By appreciating and respecting others, we become a magnet for their reciprocated friendship.

So, how do you give a compliment? First of all, you give it—freely and without the expectation of anything in return. This may feel awkward at first, but that’s OK. If your compliment is genuine, the receiver will feel the power of your words. They will see warmth in your smile and genuine appreciation in your eyes.

When giving a compliment, give the other person specific information. Just saying “nice job” doesn’t cut. It is used too much as a cliché. You need to go beyond speaking in clichés.

Don’t forget the “classic” thank you notes. Send these out 2-4 days after the shift.

5. Be Ready for Volunteers

Be ready for volunteers when they arrive. If the shift starts at 12:00 p.m., you need to be available to greet volunteers at 11:45 a.m. All logistical details need to be completed by this time. A disorganized coordinator or trainer gives a bad first impression. Volunteers start to wonder if you are going to waste their time and other “red flags” in the overall experience.

Don’t overlook the role of food and fun during the campaign. Volunteers appreciate food and beverages. This is important if your activities are close to the lunch or dinner hour. Match the type of food to your volunteers. Do they like snacks, veggies and dip, water or soda? Variety of food and drinks is always a good idea.

Don’t overlook fun. Weave some fun or fellowship time into the volunteer experience. Fun and fellowship helps to build relationships. Customize this for each campaign. Ask other volunteers for their ideas and delegate this to them.

In Conclusion

You’ll never build a grassroots army if people don’t enjoy being in the ranks. Your leadership and relationship to them is important. If you start with a small, motivated, excited team, they won’t be a small team for long.

Even if the victory center has balloons and streamers, if the volunteers feel like the work they are doing is not useful, they will become discouraged and quit. On the other hand, if they are doing useful work and the campaign recognizes their work, they'll feel like they make a difference and double their efforts.

In summary, having an effective grassroots organization is essential to modern campaign success. By treating your volunteers with respect, giving them meaningful work, and making the experience fun, you'll soon have more people than you could imagine out knocking on doors and persuading voters. In today's environment, that's the winning edge.

References

Some materials adapted from www.wellstone.org
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Multiple National, Statewide, and Local Elections in Wisconsin

Volunteer Engagement Process



Campaign Vs. Volunteer Perspective

