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# Motivating, Care & Feeding Of Volunteers

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## Participant Workbook

PRESENTED BY: GAEL TREESIWIN

FOR THE

WASHINGTON CHAPTER OF THE AMERICAN PLANNING ASSOCIATION  
CONFERENCE IN SEATTLE, WASHINGTON

APRIL 21<sup>ST</sup> 2015



CREATIVE LEARNING SERVICES

This training was designed by Gael Treesiwin, Creative Learning Services specifically for the Washington Chapter of the American Planning Association (APA) with input from the following members;

Laura Hudson, Vice President of the Washington Chapter of APA

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*CREDIT*



Debra Hansen, Director of WSU. Stevens County Extension  
for information on volunteerism

## LEARNING OBJECTIVES

Participants will learn;

1. What today's volunteers look like
2. How they want to get involved
3. How to use generation specific strategies to recruit and motivate volunteers from four different generations
4. How to engage volunteers and get them motivated to work with your organization

*Volunteers don't look like they did yesterday.  
Yesterday's volunteer programs were designed for a different world.  
And it worked back then.*

*Volunteer managers who still operate like they did in the 20<sup>th</sup> century  
are the managers that keep asking the following questions:*

- *Where have all the volunteers gone?*
- *Why aren't people as committed as they used to be?*
- *What's wrong with these young people?*
- *Why are people so busy these days?*

*Source: Jonathan McKee and Thomas W. McKee, "The New Breed of Volunteer –  
Understanding and Equipping the 21<sup>st</sup> Century Volunteer" 2008*

## WHAT TODAY'S VOLUNTEERS LOOK LIKE?

**Volunteering continues to be a vital component of the fabric of our nation, enriching both our communities and those who serve.**



*Source: Corporation for National and Community Service*

There are plenty of volunteers still willing to get involved. In actuality, a whole arena of new volunteers exists who'll get involved and be committed to an organization.

*But they will become involved according to their own rules – not yours.*

# AGENDA

## Motivating, Care and Feeding of Volunteers

Time: 2:00 – 4:00 PM

Location: Seattle Convention Center

Instructor: Gael Treesiwin, Creative Learning Services

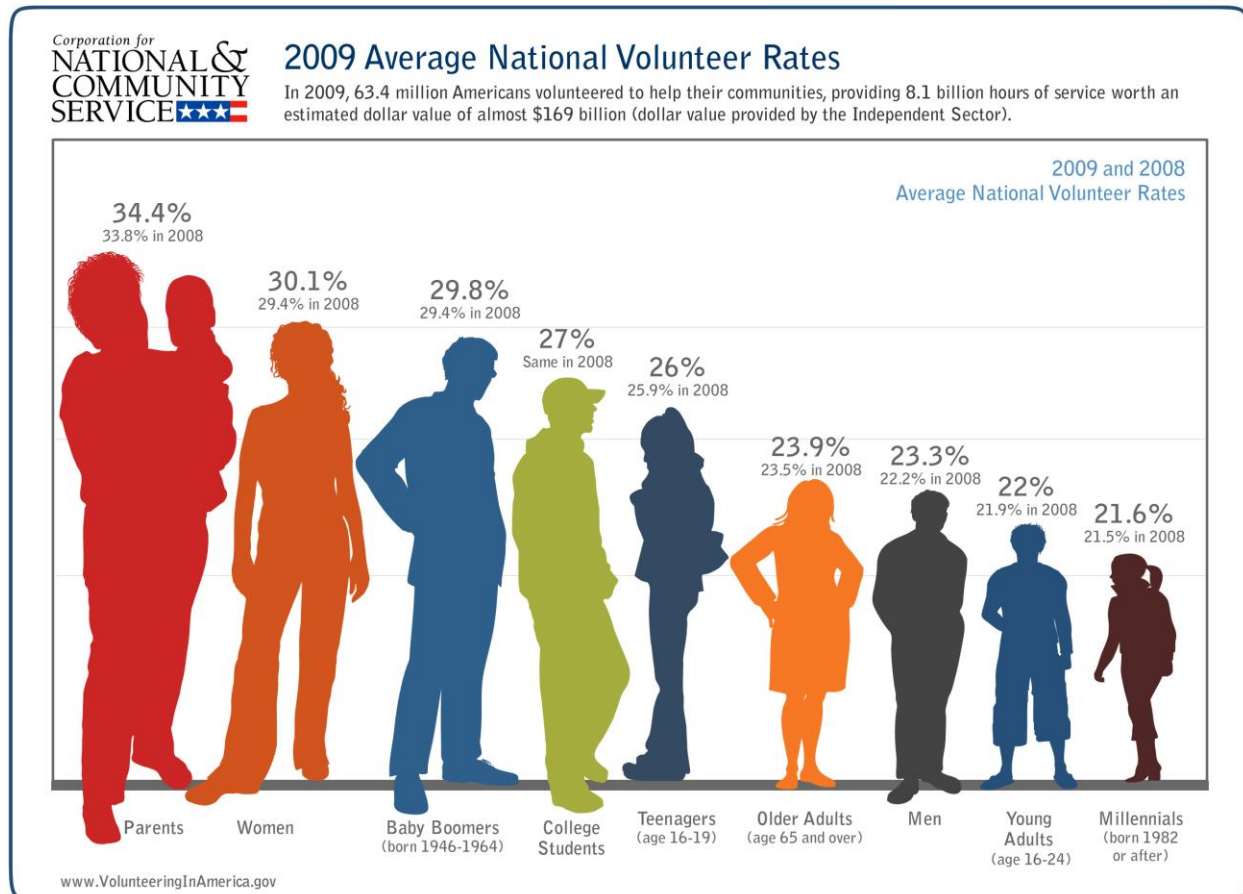
1. News U Can Use Quiz – volunteerism today – an interactive exercise
  - What do volunteers look like today who is volunteering?
  - Why people volunteer – top reasons
  - Seismic shifts that have impacted volunteerism in the USA
  - Past and future trends
  
2. The new breed of volunteers – how to recruit and them
  - Generational differences
  - Six things not to do to recruit volunteers
  - The Tom Sawyer story – how did he get people to white wash his Aunt’s fence?
  - Successful recruitment strategies
  
3. Managing volunteers in today’s world - motivating, feeding and keeping volunteers
  - Retaining volunteers by motivating them
  - Motivating attendees to come to conferences, section meetings, special events and Board meetings
  - Speak to what drives them – “Career Anchors”
  - Move from delegation to empowerment

*Volunteers are not paid because they are worthless.*

*They are paid because they are priceless!*

*Eleanor Roosevelt*

## WHO VOLUNTEERED IN 2009?

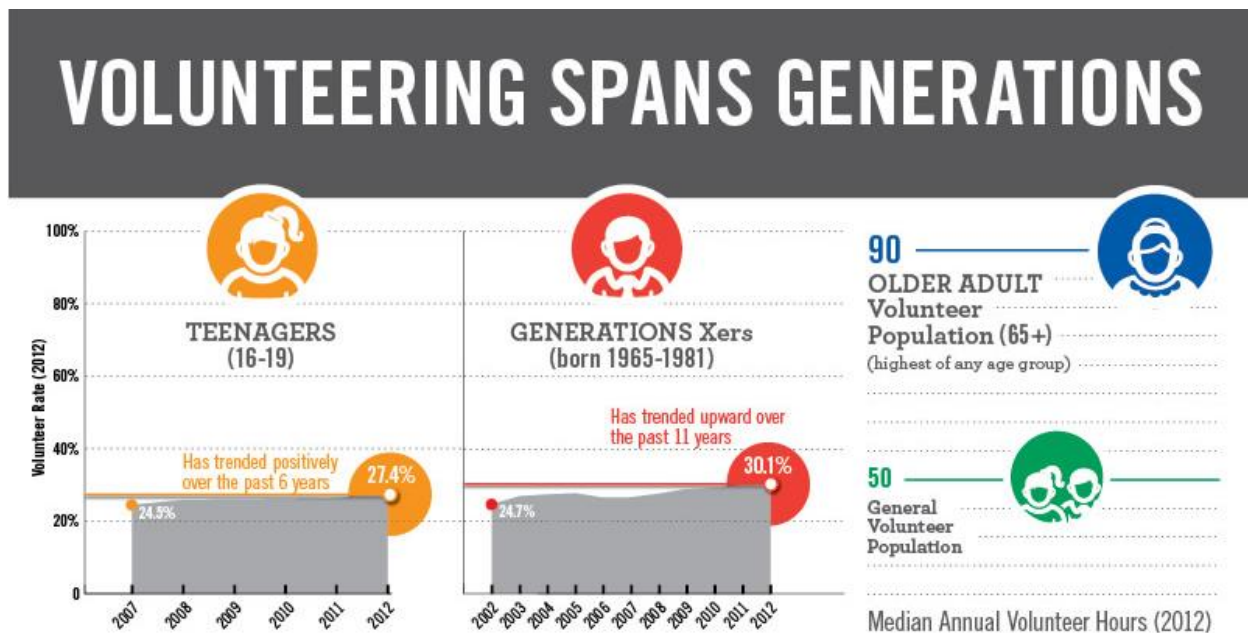


Top 2 reasons people become engaged and contribute to a city's health and "social fabric"

1. How they were welcomed into the community.
2. How connected they feel to their neighbors and other residents.

Source: Knight Foundation Study [www.knightfoundation.com](http://www.knightfoundation.com)

## WHO VOLUNTEERED IN 2012?

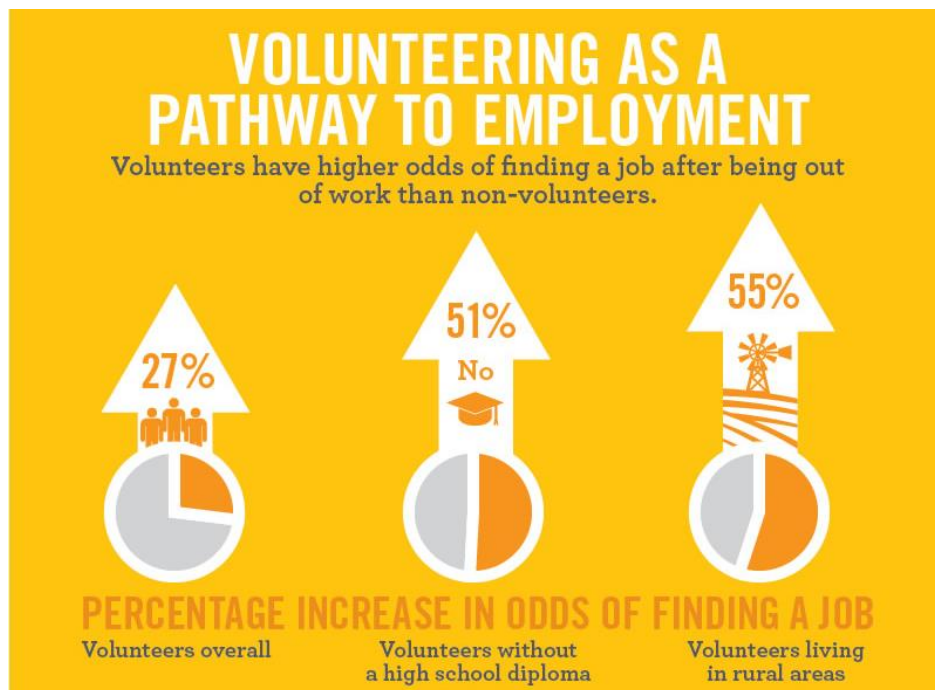


### Demographic Trends – 2008 to 2013

1. Highest percentage of volunteers are older volunteers 65% and older
2. 50% of the volunteer population are baby boomers and older
3. More women than men volunteer but fewer women today volunteer than they did in 2008
4. More teenagers and young people are volunteering (Gen Y or the Millennial).

Source: Corporation for National and Community Service Studies 2008 and 2012

## VOLUNTEERS HAVE HIGHER ODDS OF FINDING JOBS



Volunteers are twice as likely to donate to charity

## VOLUNTEERING SUPPLEMENTS GIVING

Volunteers are almost twice as likely to donate to charity as non-volunteers.





## WHO IS THE NEW BREED OF VOLUNTEER?

As we approached the end of the 20<sup>th</sup> century and entered the new millennium, developments and trends evolved that changed the way we need to operate when recruiting and motivating volunteers. The new developments were like seismic shifts – small changes and adjustments that caused what some consider to be massive transformation in volunteer management. In the last 20 years, six seismic shifts have shaken the world of volunteer management and have catalyzed this new breed of volunteers.

### ***SEISMIC SHIFT #1 Family dynamics from the traditional nuclear families to non-traditional families. From “Father Knows Best” to the “Gilmore Girls”***

- In the first ½ of 20<sup>th</sup> century many volunteers were stay at home moms.
- In the last ½ of 20<sup>th</sup> century many women began to work outside the home
- By the 1990s the percentage of families headed by a married couple dropped to 53% according to U.S. Census reports.
- 1990s to the present – now Mom has her hands full – and in many cases didn’t have Dad’s hands to help her – she has less time to volunteer

### ***SEISMIC SHIFT #2 Isolation: from community to individualism***

- Americans today have fewer close friends today than their parents did
- Remarkable drop in the size of people’s core network of confidants e.g. those reporting “no confidants jumped from 10% in 1985 to 25% in 2004
- As people choose fewer number of close friends, they become less likely to volunteer
- GOOD NEWS is that from 2002 – post September 11<sup>th</sup> attacks then Hurricane Katrina four years later there was a significant increase in volunteer involvement from 59.8 Million in 2002 to 64.5 Million in 2004 and then 75 Million in 2010
- Where you will find volunteers is changing – from your close circle of friends to reaching outside of traditional network of friends. e.g. while churches were active in post Katrina volunteer work – the vast majority of volunteer workers came from organizations like the American Red Cross

Source: Corporation for National and Community Service 2011

## WHO IS THE NEW BREED OF VOLUNTEER?

### ***SEISMIC SHIFT #3 Flexibility: from rigid scheduling to volunteer availability***

- Traditional 9:00 AM to 5:00 PM has changed to flexible hours and shifts – 24 hour coverage and volunteers today are demanding flexibility in scheduling volunteer hours.
- Rather than recruiting volunteers for preset slots, organizations are asking volunteers how they want to be involved.

### ***SEISMIC SHIFT #4 Generations: from experienced veteran volunteers to novice Millennials or Gen Y***

- Young people born after 1981 are often ignored in volunteer recruitment efforts. That is a mistake. They will volunteer if they think they can make a difference.
- Gen Y is interesting. They will answer their cell phones in the middle of meetings, live in their iphones, they prefer texting to talking and they were raised on video games, e-mail and chatting
- This generation is an untapped resource and will volunteer if you know how to reach them.

### ***SEISMIC SHIFT #5 Technology: from face to face to cyber space***

- The impact of the internet. It is now possible to recruit volunteers all over the world.
- Virtual volunteers who never existed before are now possible.

### ***SEISMIC SHIFT #6 Professionalism: from skilled workers to knowledge workers***

- Since 1980s, the rise in knowledge workers has effected the American workforce and volunteerism in the process.
- A knowledge worker is someone who likes and does make decisions.
- Knowledge workers like to be empowered.
- Knowledge workers want to influence how the project/organization will go.
- They want to be treated as professionals with expertise.

## PROFILE OF THE NEW BREED OF VOLUNTEER

- Is very busy and has many obligations
- Wants flexibility
- Expect to be empowered. They want to drive the program and call the shots.
- Does not tolerate working side by side with incompetent volunteers.
- Is tech savvy
- They want to be asked what they see as needs and how they can help.
- They have a passion but they may not always fit the old mold or organizational pattern or culture.
- Doesn't just want to make a contribution but wants to make a difference.
- The old system worked for the stay at home Moms but the new system of volunteer work needs to be more flexible and able to customize the volunteer job for the individual.
- Doesn't want to be micro-managed.

Source: Jonathan and Thomas McKee – “The New Breed of Volunteer”

## GENERATIONAL DIFFERENCES AND UNIQUENESS

### The Generations

- Builders or traditionalists: (1926-1946) 68 -88 years old
- Baby Boomers: (1947-1964) 50 to 67 years old
- Gen X: (1965-1980) 34 years to 49years old
- Gen Y or Millenials: (1981-2000) 14 to 33 years old

*The future: Gen @ 2000-present 14 years and younger*

### Builders or traditionalists: (1926-1946) 68 -88 years old

- Traits: conservative, discipline, respect for authority, loyal, patriotic, practical
- Defining Events: Great Depression, WWII, Korean War
- Work belief: is inevitable
- Work Ethic: loyal, dedicated, follow the rules

### In the organization...

- Employment Goals: retirement for some
- Communication: face to face
- Time at Work: punch the clock
- Leads by: hierarchy
- View of Authority: respectful
- Outlook: practical

### Recruiting, engaging and motivating builders

1. Offer opportunities for them to mentor
2. Offer opportunities to continue using their talents
3. Allow them to volunteer and continue helping out
4. Show them that you value their expertise and contribution

*For the first time in history, we have 4 generations in the workplace!*

## GENERATIONAL DIFFERENCES AND UNIQUENESS

Baby Boomers: (1947-1964) 50 to 67 years old

- Traits: idealistic, break the rules, time stressed, politically correct, optimistic, wants recognition
- Defining Events: Vietnam War, Woodstock, Watergate
- Work is: An exciting adventure
- Work Ethic: driven, workaholic

In the organization....

- Employment Goals: second career
- Communication: telephone
- Time at Work: visibility
- Leads by: consensus
- View of Authority: love/hate
- Outlook: optimistic

Recruiting, engaging and motivating baby boomers

- Help them explore their next set of work/volunteer options
- Demonstrate how your organization can continue to use their talents
- Walk the talk on work/life balance by redesigning their volunteer time to accommodate multiple life demands
- Encourage them to enrich their present job/life and grow in place if they need to slow their career pace
- Help them to improve computer and mobile phone skills if they are interested.

## GENERATIONAL DIFFERENCES AND UNIQUENESS

Gen X: (1965-1980) 34 years to 49years old

- Traits: self-sufficient, skeptical, flexible, media/info/tech savvy, entrepreneurial
- Defining Events: collapse of communism, missing children on milk cartons, computers in school
- Work is: difficult challenge
- Work Ethic: balanced

In the organization...

- Employment Goals: work/life balance
- Communication: cellular phone
- Time at Work: why does it matter if I get it done?
- Leads By: competence
- View of Authority: unimpressed
- Outlook: skeptical

Recruiting, engaging and motivating Gen Xers

- Talk to them about their reputation not just job tasks
- Give them your candid perspective and feedback
- Acknowledge their ability to work independently
- Encourage them to leverage their entrepreneurial abilities
- Help them get the most out of every job/volunteer position by discussing what the work can do for them and what they can learn from it.

## GENERATIONAL DIFFERENCES AND UNIQUENESS

Gen Y or Millennials: (1981-2000) 14 to 33 years old

- Traits: confident, well-educated, self-sufficient, tolerant, socially/politically conscious, hopeful and optimistic
- Defining Events: school shootings, terrorism on US soil, corporate scandals
- Work is: to make a difference
- Work Ethic: values diversity and change
- Outlook: Hopeful and optimistic

In the organization...

- Employment Goals: idealistic
- Communication: IM/Text messaging
- Time at Work: is it 5 p.m.? I have a life ya know.
- Leads By: pulling together
- View of Authority: polite
- Outlook: hopeful

Recruiting, engaging and motivating Gen Y (Millennials)

- Demonstrate the stability and long-term value of your organization
- Show how your organization is flexible and filled with learning opportunities
- Provide work schedules that help them build careers and families at the same time
- Make groups and teams part of their job
- They really like “clubs” – they grew up with them in school

## RECRUITMENT STRATEGIES - THE TOM SAWYER STORY

*“The Glorious Whitewasher” – how did Tom get people volunteer to help him to whitewash his Aunt’s fence?*

Excerpts from Mark Twain’s “The Adventures of Tom Sawyer

*Saturday morning was come and all the summer world was bright and fresh and brimming with life. There was a song in every heart; and if the heart was young the music issued at the lips. There was a cheer in every face and a spring in every step.*

*Tom appeared on the sidewalk with a bucket of whitewash and a long-handled brush. He surveyed the fence, and all the gladness left him and a deep melancholy settled down upon his spirit. Thirty yards of board fence nine feet high. Life to him seemed hollow and existence but a burden.*

*At this dark and hopeless moment an inspiration came upon him! Nothing less than a great inspiration. He took up his brush and went tranquilly to work. Ben Rogers hove in sight presently – the very boy whose ridicule Tom dreaded. Ben’s gait was hop-skip – and jump. He was eating an apple and giving a long melodious whoop at intervals followed by deep-toned, ding-dong-dong for he was personating a steamboat.....*

*Tom went on whitewashing – paid no attention to the steamboat. Ben stared a moment and said: “Hi-ya! You’re a stump ain’t you!”*

*No answer. Tom surveyed his last touch with the eye of an artist, then he gave his brush a gentle sweep and surveyed the result as before. Ben ranged alongside him. Tom stuck to his work. “Hello old chap, you got work, hey? Ben said.*

*Tom wheeled suddenly and said: “Why it’s you Ben I warn’t noticing.”*

*Ben said” say I’m a-swimming. I am. Don’t you wish you could? But of course, you’d druther work – wouldn’t you? Course you would!”*

*Tom contemplated the boy a bit and said: “What do you call work?”*

*“Why ain’t that work?” Tom resumed his whitewashing and answered carelessly: “Well maybe it is and maybe it ain’t. all I know is that it suits Tom Sawyer.”*

*“Oh come on now, you don’t mean you like it!” The brush continued to move. “Like it? Well I don’t see why I oughtn’t to like it. Does a boy get a chance to whitewash the fence every day?”*

*This put the whole thing in a new light. Ben stopped nibbling his apple. Tom swept the brush back and forth – stepped back to note the effect – added a touch here and there – criticized the effect again – Ben watched every move and getting more and more interested and more absorbed. Presently he said; “Say Tom. Let me whitewash a little.”*



## RECRUITMENT STRATEGIES – WHAT DID TOM SAWYER DO?

*How did Tom Sawyer recruit Ben to volunteer to whitewash his Aunt's fence? What strategies did he use?*

## SIX ACTIVITIES NOT AVOID RECRUITING VOLUNTEERS

### 1. Expect announcements to get volunteers

- NO to e-mails, posters, newsletters, meeting announcements as the only methods used.
- YES to personal asks
- YES to a personal invitation

### 2. Go it alone

- YES to a recruiting team
- FIND people who;
  - Passion for your organization
  - Already actively volunteer
  - Are clear communicators
  - VISIONARY – prone to possibility thinking and action

### 3. Recruit only volunteers who make long term commitments

*“Would you like to spend the next 3 years of your life volunteering 3 hours each Monday night 3 hours a week, 3 hours on Sunday morning and attend regional and local events?”*

- Small requests at first
- Let them choose how they wish to volunteer and what time commitments they can make

### 4. Assume that “NO” means “NEVER”

- YES to: when you get a negative response listen to the reasons
- NO to never asking them again
- Maybe another time will work and they will say YES

### 5. Recruit only “BIC” (Butt in the Chair) people

- NO to the wrong person in the chair
- YES to
  - Written roles and responsibilities
  - Position charters. Charters are purpose statements for the volunteer job

## SIX ACTIVITIES TO AVOID RECRUITING VOLUNTEERS

### 6. Treat professionals like lackeys

- Retiring baby boomers and Gen Y or Millennials have expertise they want to put to good and relevant work.
- YES to... Finding a way to use their skills and knowledge
- YES to ... speaking to what drives them – “Career Anchors.”

### *AVOID the Classic “Oh by the ways”*

- *Oh by the way*, all volunteers pay dues to the State organization. Dues are \$150/year.
- *Oh by the way*, each year board members must attend the State conference and attend all Board meetings
- *Oh by the way*, all volunteers need to be fingerprinted and have a background check
- *Oh by the way*, all volunteers are expected to spend at least 12 hours/ year...

*Most important: Potential volunteers need to know that what they are committing to is worthwhile and also meaningful to their lives.*

*Source: Jonathan and Thomas McKee, “The New Breed of Volunteer”*

## RECRUITMENT STRATEGIES – “THE COURTING RELATIONSHIP”

The best recruiters of volunteers do NOT use the classic aggressive “car salesman” strategies. The best volunteer recruiters view recruiting more like a dating process.

**First date:** get to know each other before asking for a commitment.

- Build a relationship with the volunteer and what is important to him/her before asking for a commitment to volunteer
- First date might be simply thanking the potential recruit for their contribution in a conference seminar or workshop or a tour of your office or facility.
- Take time to talk to a potential recruit before popping the question

**Second date:** ask the volunteer to help focusing on tasks they might be interested in.

- Present your need
- Be specific
- Share experiences and roles
- Get their input on how they want to volunteer and their own time commitments
- You may want to start with a small time commitment or one they can do remotely “the virtual volunteer.” For example: research to get data or identify conference speakers
- Avoid the classic “Oh by the way....”

**Future dates:** After a second date many volunteers will make a commitment to serve.

- During this time they will read about your organization, study it, and observe others.
- Some may need more time before making a commitment and might even say “no.” Don’t be discouraged. “NO” often just means “not now.” In six months to a year you ask for another “date.”

This recruitment method may seem like a long process. However, consider the time wasted in training and retraining a high percentage of volunteers who quit because they may have felt railroaded into volunteering. The truth is you are way ahead if you use the dating method for recruiting volunteers.

Source: Jonathan and Thomas McKee, “The New Breed of Volunteer”

## MOTIVATING AND KEEPING VOLUNTEERS & REGULAR ATTENDEES

### 1. Discover what motivates each volunteer

Questions: answer these questions and you will begin to tap into motivational drives.

1. *Why do people join APA?*
2. *What motivates them to invest time, money and talent to APA sections or State?*
3. *What does it take to keep them involved?*

Most people respond to three levels of motivation;

#### **The self-serving motivational drive**

- People join an organization because it meets their needs
- They stay because it continues to meet their needs

#### **The relational drive**

- People volunteer because of friendship. When a friend personally asks they usually say yes or at least have a hard time saying no.
- IIR Investing In Relationships is a good strategy

#### **The core motivational drive –their beliefs**

- What they believe in results in the strongest level of commitment
- They believe in the organizations cause

### 2. Give regular feedback

- People want to make a difference. Without feedback they may not know that they have made a difference
- Personal thank you notes are very effective
- Generational differences: Gen Y may not even read a letter. Send an e-mail thank you instead and Baby Boomers the exact opposite. They even like just a handwritten note on a sticky tab

## MOTIVATING AND KEEPING VOLUNTEERS & REGULAR ATTENDEES

### 3. Offer special privileges and perks

Volunteers love perks! Some affordable examples:

- Recognition dinners or events
- Free admission to conferences and workshops
- T-shirts or mugs
- Complimentary memberships

### 4. Provide vocational training

- Provide training credits towards a certification
- Provide training for free
- Send the volunteer to special training of their choice

### 5. Provide free food and social networking time

- Free food is often underestimated as a motivator. It is HUGE!
- Idea: give volunteers/members a reason to come early to a conference – free dinner or cocktail time
- Schedule potentially challenging things (Board meetings) back to back with food and social time
- Have food at meetings. It is just basic hospitality

### 6. Provide tangible incentives

- Logo appeal – provide T-shirts, note pads, sweatshirts, or caps with logos on them. Don't skimp!
- Restaurant or coffee certificates
- Say it with flowers
- Personal awards given at meetings
- Recognition plaques
- Gift incentives at events e.g. baskets. People earn tickets for getting to workshops on time, for filling out evaluations and turning them in, for attending workshops. They can place the tickets in any drawing for a gift that they want to.

## MOTIVATING AND KEEPING VOLUNTEERS & REGULAR ATTENDEES

### 7. Be available to volunteers

- Most volunteers want to sit around and talk pre/post volunteer time
- Take the time to check in with volunteers about how things are going in their life
- Recognize them regularly

### 8. Have fun

- An amazing motivator
- Can also serve as a stress buster
- Don't forget to laugh once in awhile
- Fun things that are meaningful to the particular group of volunteers. E.g. not everyone likes to bowl.
- Include families

### 9. Accountability

- Hold them accountable – including moving them out of a volunteer position if they are not doing it well and/or firing them
- Post hours donated and outcomes
- Competition may not be a bad idea
- Without accountability volunteers might think they are doing more than they are or not realize that they are not helping

### 10. Positive gossip

- When someone praises your volunteer tell them about it
- Pass along positive outcomes to everyone and credit the volunteers by name if possible
- Take pictures
- Write success stories

### 11. Thank the families

- Acknowledge the good work their family has done
- Thank them for supporting the volunteer so he/she has time to contribute

What is the common thread?

Answer: Recognition and Respect

## EMPOWERING VOLUNTEERS TO DO IT THEIR WAY

Moving from delegation to empowerment – why is this important?

The whole concept of empowerment is important because in the 1980s a major shift took place in the workforce from skilled workers to knowledge workers. If you don't treat knowledge workers like knowledge workers – not skilled workers – they will most likely quit or at least loose morale.

What is the difference?

**Skilled workers:** don't make big decisions. Pretty much they do as they are told. When questions arise outside of their job description, they refer to their supervisors. This is “delegation level” of worker/volunteer.

**Knowledge worker:** Generally they don't ask their supervisors. They are empowered to make decisions. This is the “empowerment level” of the worker/volunteer.

Empower workers and you will most likely keep them.

Tips for successful hand offs to empower volunteers and reduce your own stress

1. **Don't take the monkey on your back.** Teach them how to feed the monkey on their back or another football analogy - Don't take hand-offs or the “ball” to you – hand it back to them. Especially don't take the monkey or the ball if you can't do anything about it.
2. **Loose the control stick** – their way may just work even if it isn't your way. Clearly articulate the outcomes you want to achieve and let them figure out how to achieve the outcomes. Acknowledge their outcomes when they do achieve them.
3. **Label each “hand-off” as either delegation or empowerment** – let them know who is responsible for what task. Delegated volunteers must ask for decisions. Empowered volunteers don't have to ask. They make decisions and solve problems as they arise.
4. **Break tasks down into manageable goals or outcomes**
5. **Tend your volunteers** – check in with your volunteers and see how they are doing and if they need anything especially from you.
6. **Develop your own empowerment skills to avoid disaster.**



## RESOURCE MATERIALS AND TAKE AWAYS

1. Career anchors exercise
2. Succession planning
3. Cool websites
4. Good books for further reading

### *Career Anchors Exercise*

1. Read the Career Anchors research done by Edgar Schein, Sloan Fellows Professor of Management at MIT (Massachusetts Institute of Technology).
2. How would you approach “speaking to what drives them” when recruiting or managing volunteers with different career anchors?

Technical and functional competence

General managerial competence

Autonomy and independence

Security and stability

Entrepreneurial creativity

Sense of service

Pure challenge

Organized around private life

## SPEAK TO WHAT DRIVES THEM – “CAREER ANCHORS”

*How do you keep people motivated and productive? One answer lies in the concept of “career anchors,” first developed some 30 years ago by Edgar Schein, Sloan Fellows Professor of Management at MIT. Schien says that people are motivated by one of eight anchors – priorities that define how they see themselves and how they see their work.*

| <b>Career Anchor</b>                       | <b>Description</b>   | <b>What Motivates?</b>   |
|--|--|--|
| <i>Technical and Functional Competence</i> | Desire to excel in chosen line of work.  | Money and promotions don't matter as much as the opportunity to hone a craft and develop & use their expertise.  |
| <i>General Managerial Competence</i>       | Aligned with traditional career path up. Wants to learn to do many functions, synthesize information from multiple sources, supervise large numbers of employees, and use considerable interpersonal skills. | Craves climbing up the ladder, getting promotions and higher levels of salary.   |
| <i>Autonomy and Independence</i>           | Likes to work alone and be left alone. Is most satisfied operating according to his/her own rules. Don't like to be told what to do.   | Freedom, rather than prestige is his/her goal and motivator.   |
| <i>Security and Stability</i>              | Values a predictable work environment above all – one in which tasks and policies are clearly codified and defined. Strong identification with the purpose of the organization.                              | Belief in the future stability of the organization, having a very clear vision and purpose of the organization and seeing how their work contributes to this purpose and vision. |
| <i>Entrepreneurial Creativity</i>          | Want to do something of their own and run it. Obsessed with need to create and will become easily bored if he/she is thwarted.   | To be in charge of a project and have a lot of latitude in running it.   |
| <i>Sense of Service</i>                    | Need to focus his/her work around a specific set of values is a major issue. Likes to focus work on a particular cause he/she values.  | Money is not the main motivator, rather it is to feel like his/her work is making a difference.  |
| <i>Pure Challenge</i>                      | Tends to anchor their career in being where he/she has a chance to pursue ever tougher challenges.   | Chance to seek and be involved in tough and interesting challenges.  |
| <i>Organized around private life</i>       | Most pressing concern is that his/her job gives them freedom to have a life outside work.  | Like regular work hours, ability to work at home, good benefits, extra time off and to not have to take work home at night.  |

## WHAT IS A SUCCESSION PLAN?

A succession plan ensures that qualified talent is available to replace people in key positions who leave the organization. A succession plan is especially important for organizations that are all or almost all run by volunteers.

### Sowing the seeds of success

A succession plan;

- Protects your organization's viability as it moves into the future.
- is an ongoing, continually readjusting process that is woven into your overall strategic plan as a guarantee that your organization won't miss a step when a critical position becomes vacant.
- includes developing the skills and knowledge of key staff and volunteers who can quickly become replacement talent should the need arise
- identifies externally available talent (volunteer or paid staff) sources

### Two types of Succession Plans

1. **Emergency succession** – something happens (illness, family emergency, accident or an event that means key staff or volunteer is unable to serve.
2. **Planned change** – retirement or a known transition to another job or calling.

*Massive leadership change is upon us!*

*Each day for the next 16 years 10,000 Americans will turn 65.*

*A full 85% of nonprofit Executive Directors are 50 or older.*

*67% of nonprofit leaders are expected to retire in the next five years.*

***Yet just 67% on nonprofits have a succession plan.***

Source: Leadership Transition and Succession - 501 Commons.org

## WHAT HAPPENS IF YOU DON'T HAVE A SUCCESSION PLAN?

Not having a succession plan puts the future of your organization at risk. Some of the problems that are caused when you lose talent, especially unexpectedly include;

- Lack of clarity about your organizational direction
- Anxiety among staff, volunteers and employees which can lead to a drop in morale, motivation and satisfaction
- Lower quality of service provided to your customers or clients
- Drop in productivity
- Delays in critical projects or service delivery
- Loss of critical knowledge
- A decline in your organization's reputation
- Loss of funding
- A person who is not qualified and/or lacks necessary skills may step up and take the lead role causing many problems to unfold.
- Conflict caused by any of the above.

**YOU NEED A SUCCESSION PLAN!** The good news is that you are probably already more prepared than you think.

## EMERGENCY SUCCESSION PLAN – FIRST THINGS FIRST

The basics:

1. Document all important information:

\_\_\_\_\_ PASSWORDS

\_\_\_\_\_ suppliers and vendors

\_\_\_\_\_ billing information

\_\_\_\_\_ documentation “how to” for suppliers e.g. Rural Resources, Second Harvest or Northwest Harvest

\_\_\_\_\_ bank account numbers

\_\_\_\_\_ insurance policies

\_\_\_\_\_ funding commitments,

\_\_\_\_\_ list of grants in process

\_\_\_\_\_ partnerships and contacts,

\_\_\_\_\_ emergency contacts for all staff, volunteers, Board of Directors

2. If you don't have cloud or off site back up for your computer(s) NOW is the time to do this. There are many inexpensive options. If you have Microsoft Office cloud storage might be built in or can be purchased at a minimal cost.
3. Decide who is next in charge, if there is an emergency.

*For more information on emergency succession planning, check out 501 Commons*

*Prepare/Respond/Serve on the website [www.501Commons.org](http://www.501Commons.org)*

## RESOURCES

### Cool Websites

[www.volunteerpower.com](http://www.volunteerpower.com): Jonathan and Thomas McKee's website. This website has lots of resources and ideas for developing the power and passion of the "new breed" of volunteer.

[www.worldvolunteerweb.org](http://www.worldvolunteerweb.org): fascinating worldwide web of volunteers sponsored by the United Nations. Looks at global possibilities but also how it ties to local communities.

[www.blueavocado.org](http://www.blueavocado.org) An excellent source of information and tips for leaders of nonprofit organizations regarding board leadership development, developing sustainable funding, fundraising, and managing staff, employees, and volunteers.

[www.northeastwashingtontrends.ewu.edu](http://www.northeastwashingtontrends.ewu.edu) a fantastic resource for TriCounty (Stevens, Ferry, and Pend Oreille) data. Check it out!

[www.501commons.org](http://www.501commons.org) based in West Seattle WA. Website has lots of resources for nonprofits especially financial, fundraising, volunteerism and capacity building.

[www.washingtonnonprofits.org](http://www.washingtonnonprofits.org) this website has LOTS of great resources FREE for nonprofit organizations. Their FUN BINGO is fabulous and can be downloaded for free off of this website. They regularly put on Board Leadership workshops here in the Tri-County area, in Spokane and around the state.

[www.knightfoundation.org](http://www.knightfoundation.org) This website is dedicated to information re: Informed and engaged communities. The John S. and James L. Knight Foundation lives by these words "We believe – we know – that democracy can't prosper without informed and engaged communities. Their mission is to help people be informed and engaged fully in the life of their communities.

## GOOD BOOKS FOR FURTHER READING

Arnie Dahlke, *Business Succession Planning for Dummies* – John Wiley and Sons, Inc, Hoboken, New Jersey 2012

Jonathan McKee and Thomas W. McKee, *The New Breed – Understanding and Equipping 21<sup>st</sup> Century Volunteers*, © Jonathan McKee and Thomas McKee 2008 [www.group.com](http://www.group.com)

Shore, Bill, *The Cathedral Within; Transforming Your Life by Giving Something Back*, Random House Trade, New York, New York, 2001.

Wolfe, Thomas, *Managing the Nonprofit Organization in the Twenty-first Century*, Simon and Schuster, New York, New York, 1999.

*He who knows others is wise. He who knows  
himself is enlightened.*

—Lao Tzu

*Don't bother just to be better than  
your contemporaries or predecessors. Try to be better than  
yourself.*

## About Gael

Gael is a seasoned instructional designer, trainer and organizational development consultant with over 26 years of helping organizations create frameworks for transformation and sustainability. Prior to starting her own consulting business, Creative Learning Services in 1995, Gael served as Vice President and Chief Instructional Designer/Trainer for a mid-size change management firm based in Seattle. Gael also served as Executive Director of a nonprofit organization working with social service agencies, nonprofits, and families in crisis in the Tri-County area of E. Washington.

In the past 10 years Gael has provided trainings to the State of Washington, King County, City of Seattle and other public organizations on leadership, conflict resolution, interpersonal community, change management and customer service. Gael has served for the last three years as Grant and Fund Development Coach for WSU Stevens County Extension providing trainings on Board Leadership, Volunteer Management and Fundraising. She also currently serves as the Program Initiatives Director for the Providence N.E.W. (North East Washington) Hunger Coalition, an organization of 25 members working to end hunger in Northeast Washington.

Gael's three hats:



PRESIDENT OF CREATIVE LEARNING SERVICES



PROGRAM INITIATIVES DIRECTOR  
PROVIDENCE N.E.W. HUNGER COALITION



GRANT AND FUND DEVELOPMENT  
WSU STEVENS COUNTY EXTENSION