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Andy Robinson

Building Your Board & Managing Volunteers

Schroon Lake, 5/1/24

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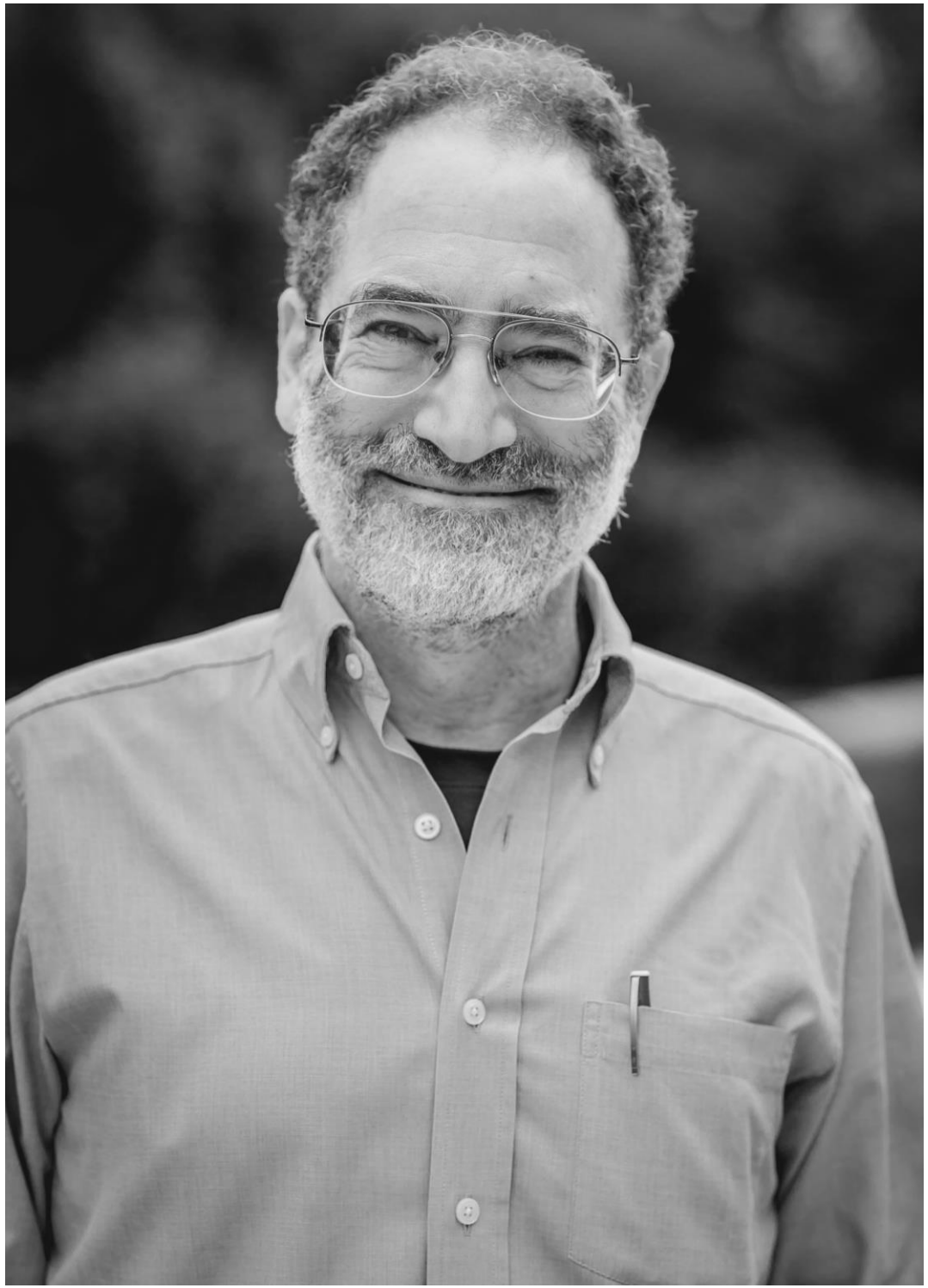


Welcome!

I’m Andy…

Author, trainer, board president, and the Swiss Army knife of nonprofit consultants

Getting started…

Why are you here?

What do you want

to learn today?

Topics for today's workshop

- Four stages: How groups change over time
- Designing your best board and recruiting to fill the gaps
- Using job descriptions for board members and other volunteers
- Volunteer recruitment & management

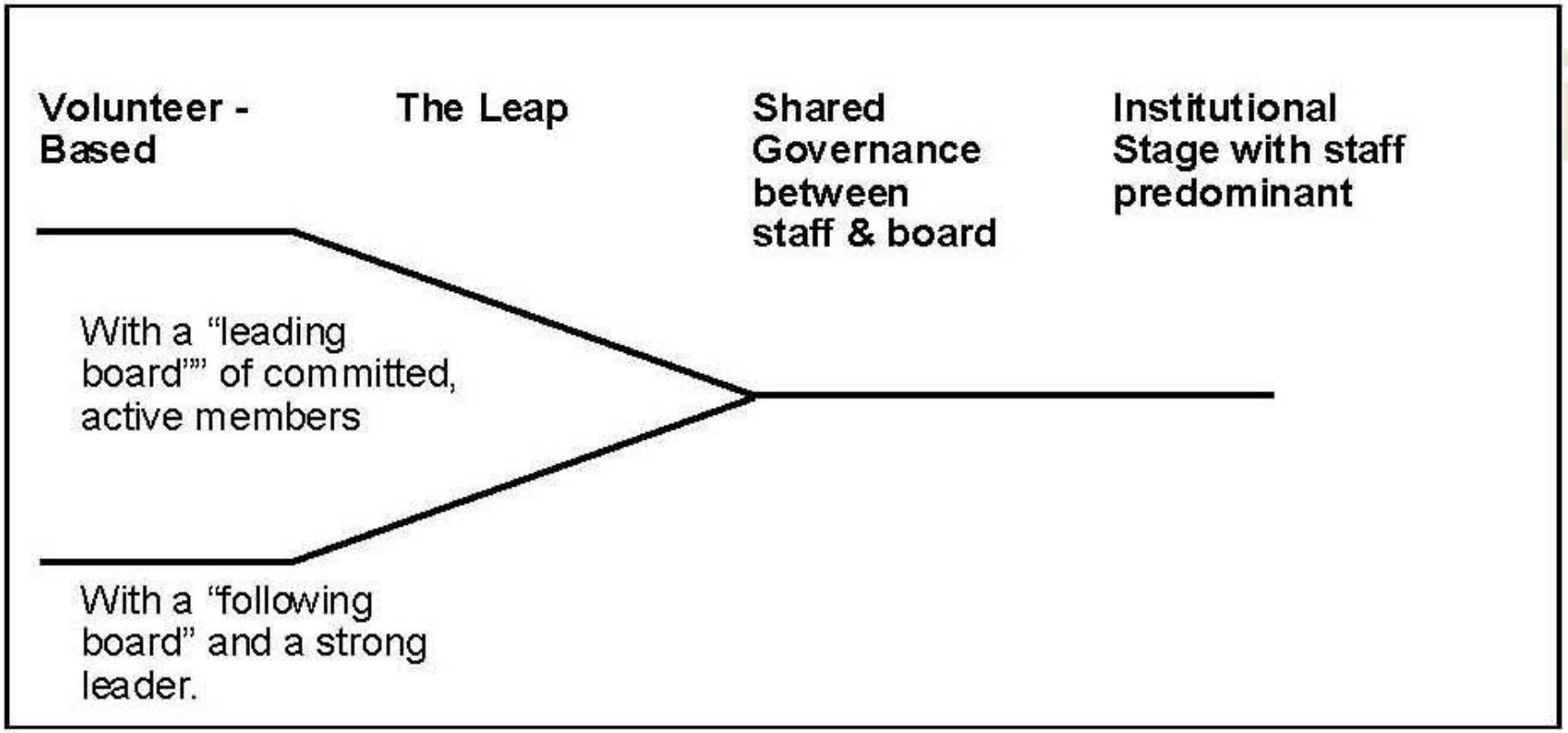
Part 1

Board recruitment and development

How organizations change:

The Four Stages

Because the board's role changes at each stage…



Adapted with permission from Institute for Conservation Leadership, www.icl.org

Designing your best board

Skills, qualities, representation

Skill, quality, representation	SJN	NO	PQ	BC	ET	RA	TC	SZ	AR

Simple scoring system

+ outstanding

√ adequate

- poor

? don't know

Skill, quality, representation	SJN	NO	PQ	BC	ET	RA	TC	SZ	AR
Meeting facilitation	+	-	?	+	+	-	-	√	+
Team player	√	√	+	√	+	√	-	+	+
Available time	+	-	-	√	√	+	+	√	-
Board experience	√	√	+	+	?	-	+	√	√
Willing to fundraise	+	-	?	?	+	?	-	+	?

Exercise

Brainstorm the **skills, qualities,** and **representation** needed to strengthen your board.

Use this tool to:

- *Identify gaps* on your board
- *Proactively recruit people* to fill gaps

The alternative – “I know a guy…” – results in a randomly-created board… and you get random results.

Why you need a **board job description**

- Sets clear expectations
- Helps with recruitment
- Clarifies what board members can expect from the organization
- Weeds out poor candidates

What board members provide	What they can expect in return
I will give my best effort to “hit the ground running”	I expect a full orientation and a board mentor
I will take my fiduciary responsibility seriously	I expect to be trained to understand our financials
I commit to being an informal ambassador	I will need training, support, and materials
As a donor, our group will be one of my top three charitable commitments	I will have the option of fulfilling my pledge in monthly payments

Exercise

What would you include in your board job description?

Part 2

Volunteer recruitment and management

Exercise

Your best or worst experience as a volunteer … and what you learned

Three models for recruiting and managing your volunteers

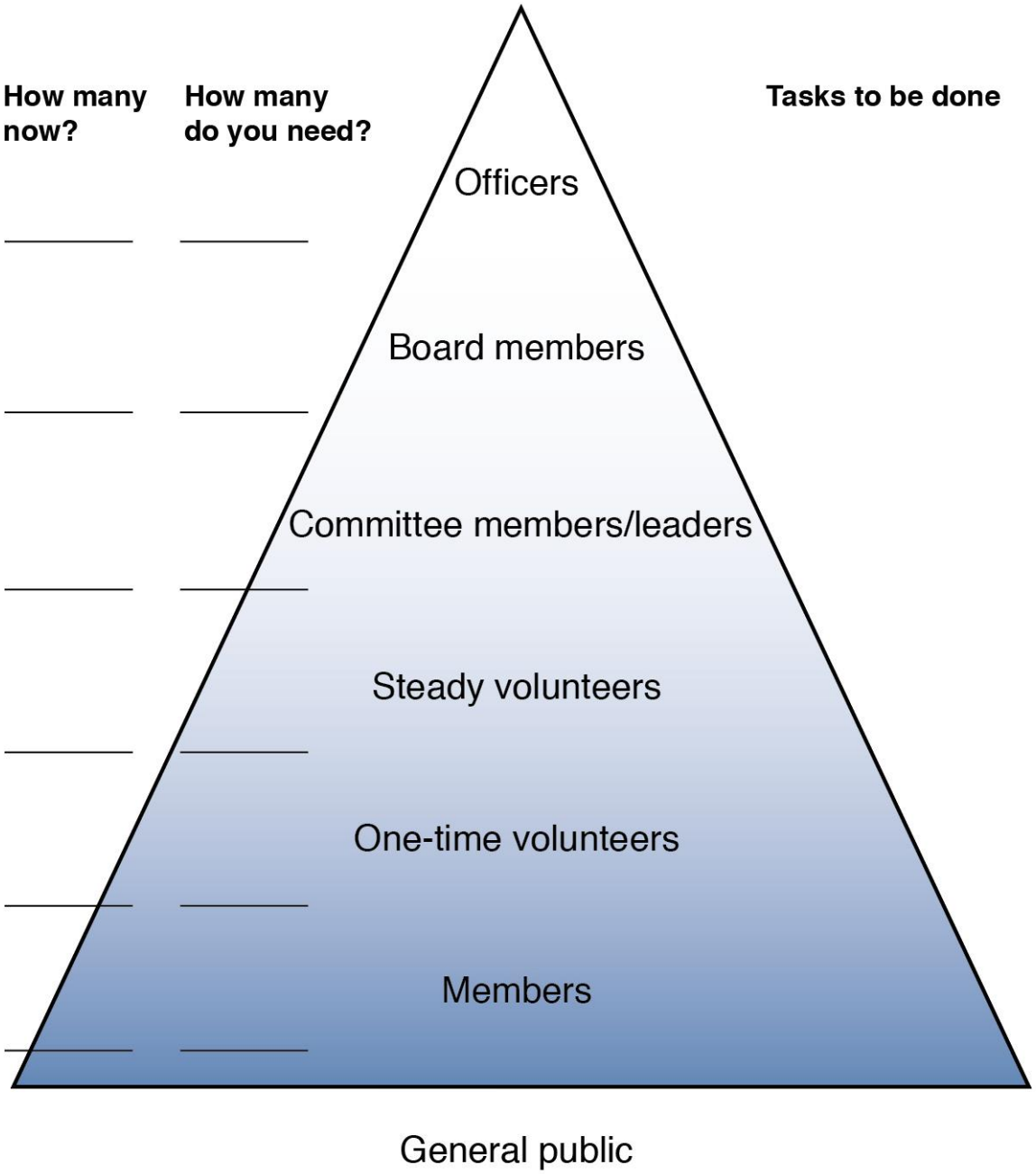
Model 1: **Grid**

Define tasks, identify appropriate level, recruit and train volunteers

	Membership	Major gifts	Benefit events	Grants	Earned income
NEW Getting started					
EMERGING More responsibility					
EXPERIENCED Leadership roles					
ESTABLISHED Teaching and mentoring others					

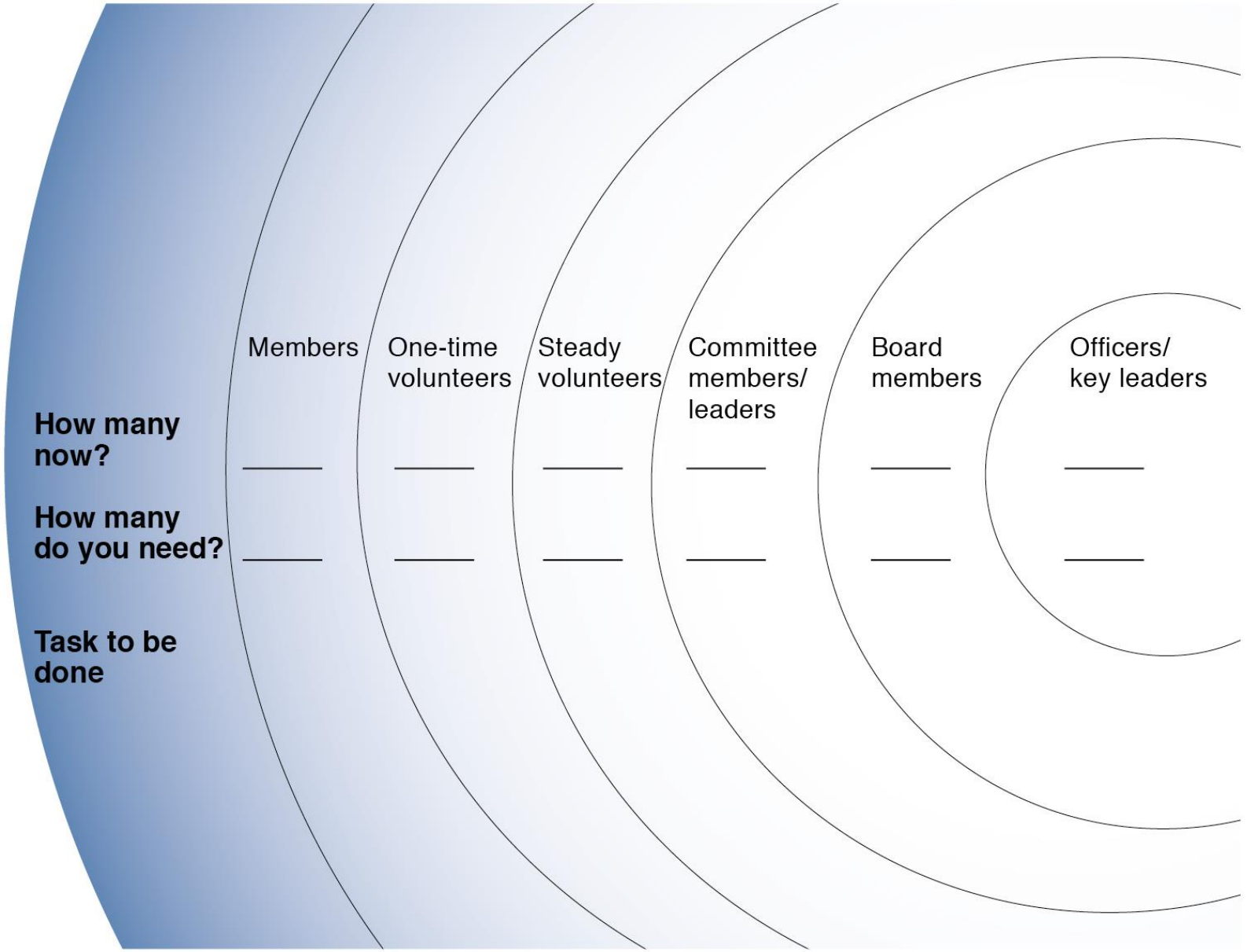
	Volunteer role: Outreach and marketing for the Civic Center
New	• Attend training • Q&A session with marketing materials • Observe community programs
Emerging	• Share info on social media • Participate in community programs • Attend news media events
Experienced	• Write news releases • Media interviews and public speaking • Help to evaluate marketing program
Established	• Facilitate training for other volunteers • Recruit board members and other volunteers with outreach experience

Model 2: **Pyramid**



	How many now?	How many do you need?	Tasks to be done
Steady volunteers	3 - 4	6 - 8	• Mailing parties • Social media shares • Program set-up and logistics • Phoning volunteers

Model 3: **Concentric Circles**



Exercise

Using one of these models, build (or improve) your volunteer structure

green decade COALITION/NEWTON

Volunteer Opportunities

Make a difference - volunteer for your environment.

The Green Decade Coalition/Newton is 99.9% volunteers, helping every day in every way. We'd love to have you join us -- once a week, once a month, once a year – however you'd like to participate.

There are lots of ways you can help – check the boxes below to let us know what you'd like to do! For more information on each committee, see descriptions on reverse side.

Energy Committee
- ☐ Help coordinate NCSC energy audit committee
- ☐ Assist with home visits after energy audits
- ☐ Outreach to community groups, PTO's, small businesses
- ☐ Help write case studies or articles on energy issues
- ☐ Help create Kyoto rewards program

Environmental Speakers Series
- ☐ Help at registration table
- ☐ Help set up and serve at tea table
- ☐ Post flyers in my village

Environmental Study Circles
- ☐ Join to learn about environmental issues
- ☐ Help coach future groups (experienced members only)

GreenCAP
(Committee for Alternatives to Pesticides)
- ☐ Promote GreenCAP's videos
- ☐ Help plan annual Alternatives to Pesticides Month events
- ☐ Distribute GreenCAP's print and web resources

Green Tours
Planning, publicity or registration:
- ☐ Urban Ark Seminars
- ☐ Solar Home Tours
- ☐ Workshops about latest green tools & techniques

Household Eco-Teams
- ☐ Join and learn to adopt earth-friendly & money-saving lifestyle practices!
- ☐ Help coach future groups (experienced members only)

Media/Public Relations
- ☐ Write articles, book reviews, etc,. for GDC's Environmental Pages in the TAB (monthly)
- ☐ Help photograph events
- ☐ Help with monthly environmental cable TV program

Membership
- ☐ Annual mailings
- ☐ January renewal
- ☐ March follow-up
- ☐ Volunteer surveys

Newsletter
- ☐ Write articles
- ☐ Help with bi-monthly mailings
- ☐ Deliver to printer
- ☐ Arrange for cartoons

Special Events
- ☐ Spring Plant & Garden Sale
- ☐ Annual June Meeting & Environmental Leadership Awards
- ☐ Newton History Museum Display
- ☐ GDC Table/Literature at
  - ☐ Tuesday Farmers' Market (July-October)
  - ☐ Spring Fest
  - ☐ Harvest Fest
  - ☐ Volunteer Fair (October)
  - ☐ Summer Concerts

Sustainable Foods Committee
- ☐ Help with issue research
- ☐ Network with grocery markets to reduce genetically engineered products
- ☐ Write articles for GDC's Environmental Pages in the TAB (monthly) or Green News

Always Needed!
- ☐ Liaison between GDC & my children's school
- ☐ GDC Liaison to one of the City's Committees:
  - ☐ Composting
  - ☐ Household Hazardous Waste
  - ☐ Bicycle Task Force
  - ☐ Mayor's Advisory Committee on Recycling
- ☐ Help in GDC Office (filing, phone, organizing)

☐ **I can do something else** (write your own volunteer task):

_____

_____

Please return this form and your membership to:
Green Decade Coalition/Newton, P.O. Box 590242, Newton, MA 02459.
You can also contact us at 617-965-1995 or www.greendecade.org.

GDC 2004 - AA

Volunteer opportunities checklist

Another example: volunteer checklist

Board fundraising menu

Menu of 2017
Fundraising Opportunities

Board Member: _____ Date: _____

This is an "all you can eat" menu!
We ask you to commit to as many items as you like – but at least one per category.

Appetizers
- ❑ Provide names of donor prospects
- ❑ Personalize letters to current and prospective donors
- ❑ Attend and mingle with donors at a House Party
- ❑ Introduce development staff to members of the business community

Entrees
- ❑ Host a House Party
- ❑ Arrange a site tour for some of your friends, conducted by the Executive Director
- ❑ Accompany the Executive Director or other staff on donor visits
- ❑ Organize a 2-hour volunteer party with friends or colleagues
- ❑ Recruit new board members with fundraising experience and connections
- ❑ Recruit Wintergreens or Farm Party sponsors
- ❑ Volunteer to help at Wintergreens or the Farm Party

Desserts
- ❑ Collect copies of other organizations' solicitations and annual reports for GCH staff
- ❑ Make thank you calls to donors
- ❑ Promote and attend one of our annual events and mingle with donors

Sample board fundraising agreement

Name _____ Date _____

To support the mission of our organization, I agree to take on the following:

1. My gift: $_____ Payment completed by (date) _____

Terms of payment (check, credit card, installments, etc.) _____

_____

2. Prospects. I will provide names and contact information for _____ prospects by (date) _____. Even if I am unable to follow up with all of these people personally, I will still add names to the list for mailings, event invitations, etc.

Sample board fundraising agreement (continued)

3. My fundraising support tasks (taken from our menu):

a. Activity_____

Date(s) _____

Projected revenue (if applicable) $_____

Help / support needed from staff or board _____

_____

b. Activity _____

Date(s) _____

Projected revenue (if applicable) $_____

Help / support needed from staff or board _____

_____

c. Activity_____

Date(s) _____

Projected revenue (if applicable) $_____

Help / support needed from staff or board _____

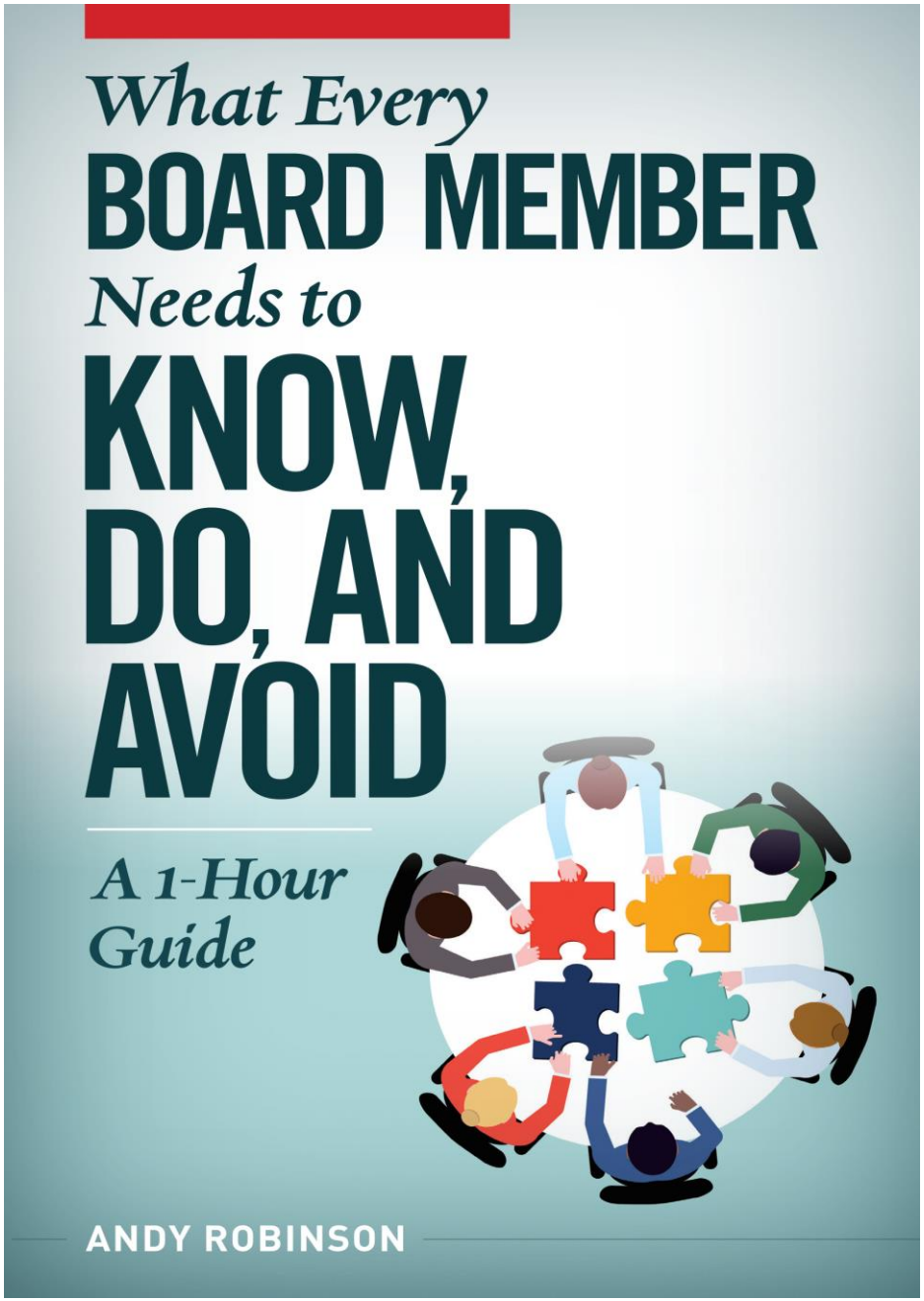
_____

_____ _____

Signature of board member/volunteer Signature of board chair

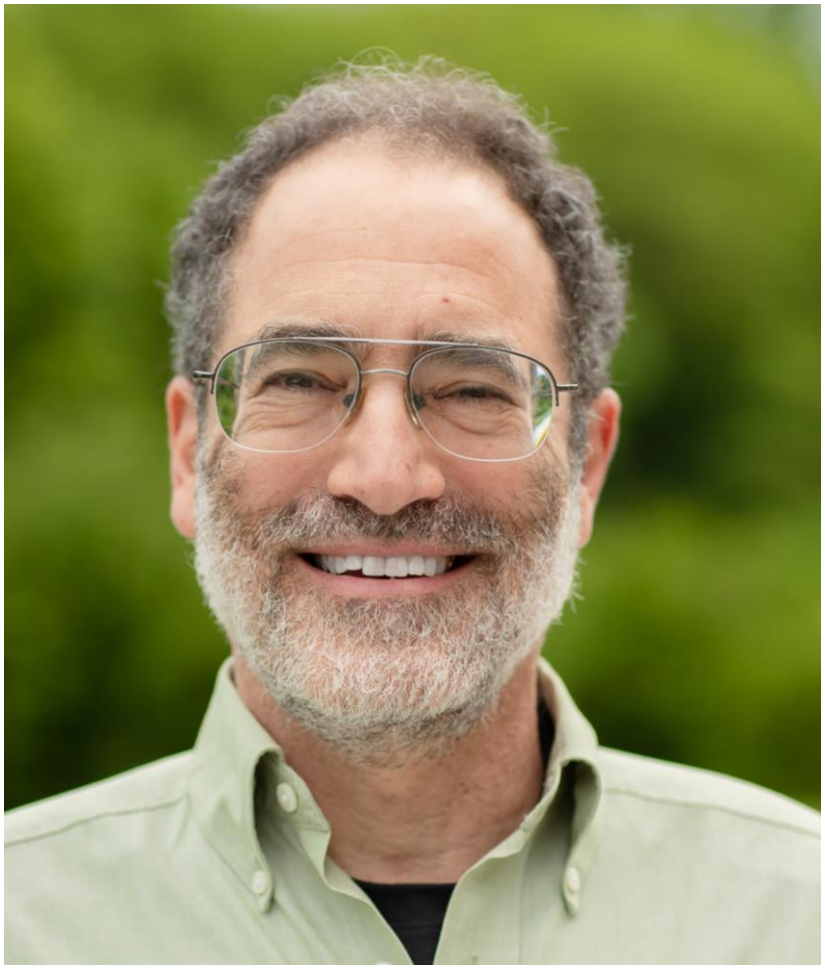
Action Planning

How will you implement what you learned today?



Andy's latest book

Available from https://hilborn-civilsectorpress.com/



Use this stuff … it works!

www.andyrobinsononline.com

www.trainyourboard.com