SUSTAINING THE VOLUNTEER EXPERIENCE: VOLUNTEER TRANSITIONS AND ONBOARDING
Do you have an organized transition for new board members? What about committee members or your one-time volunteers? Let's iron out the information your volunteers need to be successful, elements of a successful board/officer transition, and why this is so important in sustaining the member and volunteer experience.
Why Onboard?
Benefits

- Faster adjustment
- Better job attitudes
- More customer referrals
- Better performance
- Higher board engagement
- Stronger board/volunteer retention
Benefits

- Outlines and informs new board members of current initiatives and goals
- Informs people of who to contact for information or clarity on a given topic
- Allows new board members to catch on quickly
- Informing empowers
- Eases transition into new roles
- Provides existing board with affirmation that new board members are informed and prepared to engage
Onboarding

- Key elements of a successful employee onboarding program
- Give everyone a role.
- Start with introductions.
- Instill company culture and values.
- Make the process personal.
- Follow a shadowing schedule.
- Teach the technology.
- Equip employees with valuable resources.
- Evaluate the process.
The 5 C’s of Onboarding

Adapted from Dr. Talya Bauer’s The 5 C’s of Employee Onboarding
5 C’s of Onboarding

- Compliance
- Clarification
- Confidence
- Connection
- Culture
- Check-back
Compliance

- The mandatory onboarding tasks needed for all new board members
  - Sign any necessary agreements
  - Review of bylaws
  - Review job descriptions
  - Ensure access to email or common accounts

- **Current board responsibility:** Report new appointment to CEC HQ
Clarification

- Clarification refers to how well new board members understand their roles and performance expectations.

- Clarify
  - What they need to be doing
  - How they need to do it
  - How the organization functions (rules and policies)
Confidence

☐ Refers to new board members’ feelings about doing the job well and their competence to tackle new challenges

☐ Design onboarding experiences that help build up employees rather than tearing them down

☐ Prepare your board to actively support this
Connections

- Refers to how accepted and valued new board members feel
- Research has consistently shown that a sense of connection leads to various positive individual and organizational outcomes
- Relationship building
Culture

- Refers to how well new hires understand the organization’s norms, values, stories, and symbols
- How/why the component was founded
- Sharing norms, missions, and goals
- Board meeting structures
- Member engagement
- Communication expectations
Check

- Onboarding feedback
- Tracking trends in:
  - Performance
  - Understanding
  - Adapting to norms
Board Responsibilities
Preparing Your Board

- Every board is in a different place when it comes to welcoming new volunteers, ideas and input
- It’s easy to weaponize our experience and historical context when a new (or not-so-new) is shared
- Inform and empower
- Eating our young is real!
Preparing Your Board

- Build up their plans, don’t tear them down
  - Tried something before and it didn’t work? Tell them why by providing historical context.
  - If you only tried it once, try again! Fix what went wrong before
  - “Yes and” can be empowering, “yes but” is not
  - Better to try and fail than to refuse growth due to perceived failure

- Promise to seek to understand
  - Why are they proposing this?
  - Who is their intended audience?
  - What is their intended impact?
  - How is this related to their scope of work? (If it’s not, connect them to the right person to share their ideas with.)
The Board and Mentorship

- With any new volunteer, it’s important to keep in mind their potential pathway leadership.
  - We were all green at one time!

- Board leadership should turn over regularly – this keeps the component growing, sustainable and accessibility.

- Your board members should be prepared to coach and teach new volunteers. As you commit to “building your bench” your board must understand that a little extra TLC is necessary.
The Board and Mentorship

- Terms and term limits should be in place
  - Best practice for all non-profits
  - Limits and changes in leadership is encouraging to aspiring leaders and current volunteers
- Coach and teach new volunteers — this is an additional role everyone needs to play into
- Communicate vision and goals of the board to new volunteers; use this as a guiding tool when redirection is necessary
Information your volunteers need to be successful
Component-Specific Info

- Drive access
- Website
- Programs and offerings
- Membership insights
- Goals and/or strategic plan
CEC Info

- Structure
  - Umbrellas of Units & Divisions
  - CEC staff contacts
  - Board

- Resources
  - How to access
  - Pulling reports
Recruitment Practices

Set yourself up for success!
Setting Everyone Up for Success

- Board position descriptions & responsibilities are accessible for all
  - Include time commitments
- Pre-requisites are detailed
- Bylaws accessible
- Election timelines available
- Goal and strategic plan accessible
Best Practices

- One-time and micro-volunteer roles
  - Encourages people to engage who might not otherwise consider larger roles
- Thank volunteers & highlight on social media
- See people engaging in communities or at events? Tap them!
- Volunteer Square