Maximizing the VITA Volunteer Experience

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2-3:30pm ET; 11am-12:30pm PT

CFED.ORG/PROGRAMS/TAXPAYER_OPPORTUNITY_NETWORK/
Welcome

Carmen Shorter
Senior Manager for Learning, Field Engagement
CFED
Housekeeping

- This webinar is being recorded and will be available online within one week.
- All webinar attendees are muted to ensure sound quality.
- **Ask a question any time** by typing the question into the text box of the GoToWebinar Control Panel.
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Keys to Success on Today’s Webinar

• Join from a quiet space
• Grab a coffee or snack and settle in
• Engage! Send us your questions and comments as you listen
• Think about applying this content to your work throughout the webinar
Who We Are

Our mission at CFED is to make it possible for millions of people to achieve financial security and contribute to an opportunity economy.
How do we do it

We **push to expand** innovative practical solutions that empower low- and moderate-income people to build wealth.

We **drive policy change** at all levels of government.

We **support the efforts of community leaders** across the country to advance economic opportunity for all.
What’s in store for today?

• **Volunteer Challenges for VITA Programs**
  - Phil Poirier, Taxpayer Opportunity Network

• **Volunteer Management Solutions**
  - Jaime Denniston-Merced, New York Cares

• **Discussion with Presenters**
  - Phil Poirier, Taxpayer Opportunity Network
  - Jaime Denniston-Merced, New York Cares
  - Rebecca Thompson, Taxpayer Opportunity Network

• **Q & A**

• **Close**
Today’s Speakers

Rebecca Thompson
Program Director
Taxpayer Opportunity Network

Phil Poirier
Senior Fellow
Center for Social Development at Washington University in St. Louis

Jaime Denniston-Merced
Director, Training and Professional Development
New York Cares
Welcome from the TON Director

Rebecca Thompson
Project Director, Taxpayer Opportunity Network
CFED
Connect tax program leaders with each other

Build capacity of members to deliver quality service

Over 1,000 members and growing

Lift up innovations from the field

Elevate the voice of tax programs, volunteers and taxpayers

Represent the interests of tax programs to the IRS
Taxpayer Opportunity Network Members…

• Participate in learning and advocacy opportunities

• Learn about the latest developments in the field

• Access valuable resources for volunteers, program managers and site coordinators

• Get discounts to Taxpayer Opportunity Network convenings

To join or learn more, go to: cfed.org/programs/taxpayer_opportunity_network
Taxpayer Opportunity Network Mission

To **connect, strengthen and inspire** community tax programs so that they can …

- More effectively & efficiently deliver critical tax assistance
- Couple that assistance with other financial capability services
- Advocate for fairer tax policy
Poll

What is your role at your VITA site?

- Site Coordinator
- Local Tax Program Manager/Director
- State Program Coordinator
- Volunteer
- Other? Tell us in the comments box!
Poll

What have been the most pressing volunteer management issues at your sites? Check all that apply.

- Recruitment
- Training
- Attrition (losing volunteers mid-season)
- Retention (keeping volunteers year-over-year)
- Other? Tell us in the comments box!
Lessons from the TON Volunteer Management Working Group

Phil Poirier
Senior Fellow
Center for Social Development at Washington University in St. Louis
Volunteer Management Working Group

“Imagine managing a store where you’re not sure if your employees are going to show up for work”

- Volunteers are VITA’s lifeblood, but it’s challenging
- TON formed VMWG to help programs improve volunteer recruitment, retention and management
- Last Spring, VMWG undertook a project to identify key challenges and opportunities
- We’ll briefly review a few key insights from project and next steps
First: Created a “Volunteer Management Process”

Let’s hit on a few of the key insights in each phase
Program Design, Forecasting & Recruiting

What I heard most often:
• Recruiting new volunteers is hard
• Focus on key sources: students, retirees, corporate, etc.
• Each has pros and cons
• Retention is critical, but varies significantly between programs

Some insights:
• Recruiting experience is highly variable…some reinvention of the wheel
• Need more deliberate focus on retention enabled by deeper understanding of volunteer experience
Enroll, Train, & Certify

What I heard most often:

• Training is big challenge
• Lots of pain points
• Volunteers drop if they feel overwhelmed or instruction is poor
• Certification also a challenge—folks get trained, but never complete certification

Some insights:

• Training & certification are high barrier/high attrition areas—needs deeper study
• VITAs have very different training models and content
Orient, Design, & Onboard

What I heard most often:
• Volunteers should know what to expect
• Volunteers should be thoughtfully transitioned into preparer role

Some insights:
• Orientation & Onboarding have big impact on volunteer attrition
• Even though significant variation in practices, there are some common themes
• Lots of creativity and great ideas in VITA community
Operate (Schedule, Track, Report, Off-Board)

What I heard most often:
• Scheduling & Tracking are pain point
• Lots of manual practices/churn in scheduling
• Some dissatisfaction with scheduling software
• High incidence of no shows...tough to know if/when volunteers drop out

Some insights:
• Improved Scheduling and Tracking necessary, but not just a function of better software
• Tough to identify key drivers of “no shows” during filing season
Last but NOT least: the Volunteer Experience is critical

• Big impact on retention and team capability

• Volunteer Experience created by every volunteer interaction

• No clearly articulated Volunteer Experience
  • Key drivers not articulated or consistently known
Closing Thoughts

Despite challenges, feel good about opportunities to get better
• Plenty of experts and ideas in community
• Some opportunities are low-hanging fruit

What’s next:
• Full project report under review by TON Steering Committee
• SC’s initial thoughts…TON could focus on:
  ▪ Leading development of national recruiting partnerships
  ▪ Developing guide for VITA volunteer management
Insights from New York Cares

Jaime Denniston-Merced
Director, Training and Professional Development
New York Cares
New York Cares
Volunteer Management & VITA
Effective Volunteer Management Strategies

- Recruitment
- Orientation/Training
- Volunteer Support
- Keeping Volunteers
- Finding The Right Volunteer
Recruiting The Ideal Volunteer

Finding the **right person**
For the **right position**
Available at the **right time**
At the **right place**
Successful Recruiting

• Strong Volunteer Position Description

• Knowledge of your audience

• Outlined, intentions recruitment tactic

• Creative messaging

• Steady frequency
Plan For Recruitment Drop Off

• Identify each stage of your recruitment process

• You will lose volunteers at each stage, so be prepared.

• Important when considering the scale of your program.

• As much as 75-80% of volunteers can drop off during the recruitment process.
The Importance Of Recognition

- Makes volunteers feel good about the work they are doing and the time they are donating
- Helps volunteers see their impact
- Encourages retention
- Allows for higher engagement and leadership
Developing Your Recognition Strategy

Your strategy should consider:

- Audience
- Behavior
- Tactic
- Timing
- Calendar plan
Volunteer Retention

• There’s no one action that leads to successful volunteer retention. It is the combination of careful volunteer recruitment, support and recognition.

• Everyone at your organization needs to be involved.

• Tracking is the key.

• Research why volunteers stay with you or leave.
Volunteer Retention

Year 1 (10 volunteers)  Year 2 (10 Volunteers)

# that volunteered in both years (6)  60% retention from year to year

# of Year 1 volunteers (10)
Engaging Volunteers As Leaders

*Volunteer Leaders are dedicated volunteers who take on the added responsibility of managing activities and/or volunteers.*

Volunteer leader responsibilities include:

- Managing and communicating with other volunteers
- Coordinating logistics of the volunteer activity
- Serving as a resource for your volunteers
- Representing your organization to the community
What Can Volunteer Leaders Do?

Before an event or activity
• Confirm project logistics
• Communicate details to volunteers

During the project
• Welcome volunteers
• Provide information about the impact of the volunteers’ service
• Facilitate group in completing assigned tasks

Directly after project
• Thank volunteers
• Gather feedback for future projects

Within 24 hours after the project
• Submit volunteer attendance to agency staff
• Share ideas and volunteer feedback with agency staff
• Follow up with volunteers by email to thank them and encourage them to return
Communicating Impact

• Share successes with your volunteers

• Be specific - give numbers and statistics

• Pass along stories and client feedback to volunteers

• Put the volunteer’s impact in perspective
Poll

Which VITA volunteer management tools/resources would be most useful to you?  
Check all that apply.

• Recruitment strategies
• Tax law training materials
• Quality Reviewer training materials
• Financial capability training materials
• Volunteer appreciation/recognition
Poll

Which VITA volunteer management tools/resources would be most useful to you?  
Check all that apply.

• Volunteer recruitment database
• Volunteer data management
• Volunteer leadership development
• Volunteer communications
• Other? Tell us in the comments box!
Presenter Discussion

Phil Poirier
Senior Fellow
Center for Social Development at Washington University in St. Louis

Jaime Denniston-Merced
Director, Training and Professional Development
New York Cares

Rebecca Thompson
Program Director
Taxpayer Opportunity Network
Q & A

What questions do you have?
Share them in the Questions box!
Join the Network!

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Thank you!