

Module 8: Volunteer Management and Development



GOALS

By the end of this module, participants should be able to understand:

- Strategies for successful volunteer management in the PTA setting.



TIME

Total: 90 minutes

- Presentation: 60 minutes
- Exercise: 15 minutes
- Debrief: 15 minutes



MATERIALS NEEDED:

- Easel paper (five sheets per small group)
- Masking tape
- Dark markers
- Handouts
- Flip Chart
- Projector (PPT)



HANDOUTS

- PowerPoint printout
- Sample Parent Interest Survey
- Volunteer Development Exercise
- Sample Event Planning and Evaluation
- Sample Attendee Event Evaluation
- Volunteer Self-Evaluation



EQUIPMENT NEEDED

- Easel/flipchart
- If you have elected to develop your own PowerPoint presentation to suit your specific training audience for this module, you will need:
 - Computer with PowerPoint software
 - LCD projector
 - All cords and cable needed to connect computer with LCD projector, and extension cord to connect computer and LCD projector with electrical outlet
 - AV stand or tab (if you will be using PowerPoint in this module)
 - Portable speakers for videos



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Introduction

WELCOME TO MODULE 8: VOLUNTEER MANAGEMENT AND DEVELOPMENT



SAY

By the end of this module, participants should be able to understand:

- Strategies for successful volunteer management in the PTA setting.

In your role as a PTA leader, whether you are leading a committee, serving as president, or chairing a work group, the skills you will need to be able to effectively manage volunteers will not change.

However, PTA leadership changes regularly due to the nature of the democratic leadership model currently used (president, vice-president, etc.). This can create challenges for leaders in new positions because, more likely than not, you have interacted with the same PTA members for quite a while and you are the one that is in a “new” role that requires you to assume a different level of authority. Much like in the work environment when a peer is promoted to a supervisor role, the work relationships usually changes because how we interact with our peers may not always be consistent with how supervisors should act with their employees. As PTA leaders, you face a similar shift in relationships. PTA leaders need to be cognizant of the different roles within the PTA world and the focus placed on leadership.

This module focuses on general volunteer management; however, the techniques covered are valuable tools that a seasoned PTA leader or a new PTA leader can employ in order to create strong team.



DISPLAY ON A FLIPCHART OR POWERPOINT:

Strategies for Successful Volunteer Management

- Volunteer placement
- Training volunteers
- Evaluate
- Recognize and appreciate contributions



SAY

Volunteer Placement

So, you have successfully recruited new PTA members to your team. Now what?

In PTA, we place a lot of emphasis on recruiting new members which is extremely important in order to ensure that our association's strength and significance continue to increase. One area that all volunteer driven organizations need to place a stronger emphasis on is volunteer management. Too often we find ourselves spending a considerable amount of time "putting out fires". Many of the issues associated with PTA drama can be prevented with effective volunteer management.

The first step leaders should take when bringing a new volunteer into the PTA family is to have the volunteer take a Parent Interest Survey. (Handouts of examples) This tool is created by your team and must focus on the events, activities and priorities of your PTA. This is essentially a list of "job opportunities" that can help new volunteers find a role in your PTA. There are a lot of great examples available; however, this tool really needs to be tailored to your situation and needs.

When you are creating your Parent Interest Survey, it is better to have broad categories and then list out types of activities that fall under the category. If you just put the word Advocacy or Legislative Chair on your assessment, more often than not, NO ONE will mark the box. Why? Because Advocacy sounds scary and Legislative Chair sounds very political and not too many of us want to engage in politics. Let's use the example of advocacy for our category.



ASK

What are some jobs that your PTA might have in this category?



INSTRUCTOR NOTE

Be sure to write their selections on a flip chart. This list can be quite lengthy and there really is no wrong answer, so encourage attendees to think of specific examples that are "real" in their PTA world such as:

- Writing letters of support for an educational initiative.
- Attending PTA's annual legislative conference.
- Serving as a chaperone for our annual junior/senior trip to the state capital.
- Attending school board meetings.



SAY

By giving concrete examples, your potential PTA member can get a better picture of the role and expectations for each type of activity. This also allows the volunteer to share what skills and interests they bring to the group and allows PTA leadership to match the volunteer to the activities and interests that best suit the new volunteer. Volunteers who can engage in activities that they enjoy are much more likely to stay involved and remain an active member of the PTA.

The key to any volunteer assessment/survey is for the PTA leadership team to actually read and use the forms. Too often, in our busy routine, we ask parents to complete the forms, we collect them, put them in a folder with the intent of reading them and using them, and then sometime right before the end of the year, we find the folder, and “Uh, Oh...Right?” We must assign ownership of this task to a responsible person within our leadership team. This person should be the membership chair or at least someone on the membership committee. Ideally, someone within your PTA will take the information from the surveys and create a database that can be shared with the leadership team. This will allow everyone on the leadership team access to PTA members who can be called on for specific activities or roles. The goal is to match your PTA members with activities that they are interested in, have experience with and want to be involved in.

Training volunteers — Training PTA volunteers is an ongoing process, one that your leadership team must be actively engaged in. New volunteers look to the leadership team for guidance and direction so it is imperative that the leadership team takes an active, role in providing training. National PTA has a variety of training materials available to assist PTAs in training new members and seasoned volunteers. Topics range from advocacy to Reflections and everything in between. Members are encouraged to frequent National PTA's website to keep updated on new training materials and opportunities.

In our PTA world, we take a lot of things for granted. We assume that everyone knows what Reflections is. We are positive that the entire world engages in Leg Con, and surely everyone knows an SP or deals with JBF.

Example:

It is the first PTA meeting of the year and your leadership team is welcoming all your new parents and planning to kick-off a great year. Your team has worked very hard to increase membership by recruiting over 35 new parents to PTA. These parents are new to your school and are excited to be involved in their child's education. You are really excited that you have more than 100 parents in attendance!

The President addresses the group and says something like this: “Good afternoon parents, teachers and students. I am so excited to be your PTA president for this year. We want to keep these meetings short to be respectful of your time so we have a lot to cover in a short amount of time. We are planning a strong Reflections program for the year and are really excited that our Leg Chair will be attending Leg Con again in the spring. We have already begun a fundraiser for Founders and will get information to everyone just like last year. We are excited to be working on CCSSI this year and hope all of you will help us promote the initiative. Be sure to sign up for Harvest Day and pick up your cookie packets at the back table. Do not forget to get your JBF form turned in by the end of the week. We also need all of you to plan to rally the school board about the crosswalk and we cannot forget the SAT and ACT are scheduled for October. We really look forward to a great PTA year and we thank you for all that you do. As promised short and sweet.”



ASK

What do you think is running through the mind of a brand new member?
(Allow audience to share a few thoughts.)



SAY

As we all know there are only so many hours in a day and minutes in an hour and we also all know that everyone is overextended and rushed; however, parents who actually come to PTA meetings have already expressed they are interested, they feel the time is valuable, and they want to help. Make sure that the experience you provide for them matches their expectations. It is imperative that the time they give you is treated in a meaningful way and at the very minimum, they should understand what you are talking about.

Training new volunteers can include preplanned training events; however, training must also include basic “informational language” trainings. As PTA leaders, we must be mindful that everything we say needs to be understood by everyone in the room. Our rule of thumb should be that we always speak as if the person or people we are speaking to do not live in our PTA world. Too many parents would have decided not to attend future PTA meetings if their first experience mirrored our scenario, not because there was not a lot of great work planned, but because they really left not knowing what was planned, why it was planned or even what the president was talking about. This can be intimidating for some, and perceived as disrespectful to others leading both to believe that this is not the place for them.

Further, not all parents are familiar with Robert's Rules. The structure of PTA meetings can be really confusing and daunting to new members. All members of the PTA leadership team should explain the steps of the meetings that pertain to their role throughout the meeting. This should be done in a casual, conversational manner. For instance, “Hi, I am the president of XYZ PTA, and as such, I preside over all PTA meetings. Our treasurer, Sue, handles all funds for our PTA and at each meeting will give a report of our finances. Sue, please share your report.”



INSTRUCTOR NOTE

Mid-training Activity — Have participants break into small groups and rewrite the president's speech. The goal is to develop a speech that is clear, concise and meaningful. Acronyms and programs should be explained. Give the group 5-10 minutes to rewrite the speech. Have one or two groups share their speech, and discuss.

Evaluate — Why do we evaluate volunteers? (Allow participants to share a few ideas.)



SAY

Volunteer evaluations are critical in providing both the association and the volunteer the feedback necessary to improve and grow. It also gives us the opportunity to let our volunteers know the importance of the function they perform. An evaluation process that is well-designed and conducted provides an opportunity for real communication and is an essential element in building and nurturing teamwork.

Evaluations come in many forms from the verbal discussion of an event to a formal process with written documentation. It is up to each PTA to determine which evaluation process works best for their setting.

PTA leadership teams should develop and implement an evaluation process that allows them to gauge the success of events/activities, measure the success of volunteers, and inform the team of concerns/areas that may need improvement.



INSTRUCTOR NOTE

Share handouts.



SAY

The handouts are a few examples of evaluation formats that can be adopted by your PTA. When creating evaluation tools and/or methods it is important to strive to be positive and success-focused. Evaluation should never be a negative process but rather should be a process that assists all involved in making PTA a stronger group that is welcoming to all members of the community.

Much like paid staff, volunteers benefit from working with or under the supervision of someone who knows exactly what needs to be done and understands the bigger picture of the work. In PTA the leadership team comprised of volunteers fills that role. Placing someone in charge to supervise volunteers' work can increase the value of their contributions by making sure that tasks are completed correctly, questions are answered, and that your PTA is properly represented through the volunteer's work and attitude. This is especially important when members are representing your PTA out in the community.

This may seem like a no-brainer, but volunteers who consistently complete tasks incorrectly or not complete their assigned work, create a problem for your PTA. Ineffective volunteers can cause all kinds of problems, from tension with school staff members to losing PTA members. While the majority of issues like these can be avoided with screening and proper training and supervision, the time may come when a PTA simply must "fire" a volunteer.

Like any other disciplinary action, firing a volunteer is a delicate task and must be handled with the same care you would use when deciding to let go a staff member. It can be especially strange to discipline or fire someone who has offered his or her time and service for free. The same is true for volunteer board members. PTA leaders are encouraged to work with their National Service Representative (NSR) if these types of situations arise.

Recognize and appreciate contributions — Studies show that most volunteers believe the best form of recognition is to know the impact of their work. PTA leaders can demonstrate their appreciation by showing members how their individual efforts make an impact on their school, community, district, state and nation. Knowing that your PTA collected enough canned food to supplement the meals of 100 families ravaged by a tornado is truly rewarding and makes the work of the volunteer “real.” This type of information should be shared in newsletters and reports frequently so that all members can truly appreciate the impact that their PTA makes in the community. Research also reveals that volunteer recognition is tied to volunteer retention rates. Volunteers who feel their contributions are appreciated are more likely to uphold their volunteer commitments.

Good leaders recognize their volunteers from the minute they join a program by treating them as individuals with talents and interests who need to be matched to the right task. Leaders also understand the value of praising effective work at the time it takes place and treating volunteers as important members of the team. This kind of recognition is more important than any social event that might be held.

Today, PTA members are more goal-oriented, tech-savvy and mobile than ever before and the types of positions they seek have evolved to reflect this. Being flexible by offering PTA members the type of roles they want is another effective form of recognition. Volunteer recognition is personal. Getting to know your members as individuals allows you to learn the type of recognition each member would like to receive.

Recognizing where volunteers are in their lifecycle and what role volunteering plays in their life is critical to the recruitment, retention and recognition processes. The conditions, schedule and format of volunteering are important factors for people when selecting an organization; make sure your PTA has roles for all interested volunteers (parents, grandparents, moms and dads, aunts and uncles, teachers, and community members). Some volunteers love the big yearly volunteer recognition event. Others do not care at all and find satisfaction in the work and the feedback from those they work with. Volunteer recognition can be public or private and should be appropriate to the person and his/her contribution. Most of all, it should be honest and demonstrate some particular insight into what that person has done.

Formally recognizing the hard work of your PTA members is an essential part of making them feel appreciated and accomplished. Think of it as a form of compensation for their efforts. There are many ways to formally recognize volunteers and there are options for all budgets, so be creative! Formal recognition can include annual events/dinners and award ceremonies. PTAs are urged to remember to submit outstanding volunteer efforts for state and national award opportunities. Be sure to check with your state leadership for more details on available awards.

Never forget the power of a simple thank you — oral or written.

HANDOUTS

XYZ PTA President's Speech Activity

Scenario:

It is the first PTA meeting of the year and your leadership team is welcoming all your new parents and planning to kick-off a great year. Your team has worked really hard to increase membership by recruiting over 35 new parents to PTA. These parents are brand new to your school and are super excited to be involved with their child's education. You are really excited that you have over 100 parents in attendance! Take a minute to think about how you would feel if this was your first PTA meeting experience.

The President addresses the group:

"Good afternoon parents, teachers and students. I am so excited to be your PTA president for this year. We want to keep these meetings short to be respectful of your time so we have a lot to cover in a short amount of time. We are planning a strong reflections program for the year and are really excited that our LegChair will be attending LegCon again in the Spring. We have already begun a fundraiser for Founders and will get information to everyone just like last year. We are super excited to be working on CCSSi this year and hope all of you will help us promote the initiative. Be sure to sign up for Harvest Day and pick up your cookie packets at the back table. Do not forget to get your JBF form turned in by the end of the week. We also need all of you to plan to rally the school board about the crosswalk and we cannot forget the SAT and ACT are scheduled for October. We really look forward to a great PTA year and we thank you for all that you do. As promised short and sweet."

Activity: Within your group rewrite the President's speech. The goal is to develop a speech that is clear, concise and meaningful. Acronyms and programs should be explained. You will have 5-10 minutes to rewrite the speech. Select a spokesperson who will read your speech to the whole group.

****TIP** Not all parents are familiar with Robert's Rules. The structure of PTA meetings can be really confusing and daunting to new members. All members of the PTA leadership team should explain the steps of the meetings that pertain to their role throughout the meeting. This should be done in a casual, conversational manner. For instance: Hi, I am the President of XYZ PTA, and as such, I preside over all PTA meetings. Our treasure, Sue, handles all funds for our PTA and at each meeting will give a report of our finances. Sue, please share your report.**



We Need You

Parent Volunteer Interest Survey 2012/2013

Parent Name(s): _____

Student Name(s): _____

Phone: (H) _____ (C) _____ E-mail: _____

The best way to reach me is (H) ___ (C) ___ E-mail ___

Please check any of the following volunteer opportunities that are of interest to you. Please note, checking an item here is not a firm commitment on your part- it just lets us know of your interest. Our membership team will contact you with specific volunteer opportunities.

School-Wide Support

- Serve as PTA Member
- Serve on Family/School Partnership Action Team
- Participate in School-Wide Fundraising
- Popcorn Friday Coordinator
- Assist with popcorn Fridays
- Yearbook Committee
- Assist with After-School Clubs
- Maintain and Update Parent Bulletin Board
- Coordinate Book Swap
- Help to Plan Special Events (i.e. Book Fair, Family Fun Nights)
- Assist at Special Events
- Act as Crossing Guard (AM or PM)
- Help Monitor Recess

At Home Support

- Trim and Count Box Tops
- Trim Laminated Items for Teachers
- Baking or Preparing Other Refreshments for Special Events

Classroom Support

- Serve as Classroom Parent
- Assist with Project-Based Learning Activities
- Reading with small groups or individual children
- Chaperone a Field Trip
- Play Math Games with Small Groups or Individual Children

Community Support

- Help to Secure Community Partnerships (May include donations of time, expertise, goods or \$)
- Assist with Community Service Projects

Please tell us about any special interests, talents, skills or expertise that you might like to share with students, teachers or parents, i.e. gardening, scrapbooking, couponing, raising livestock, etc.

EVENT EVALUATION & PLANNING FORM

Note to Event Chairs: *In an effort to avoid re-inventing the wheel each year, we'd like to keep good records on the great, the good, the bad, and the ugly from all of our events and efforts going forward. At the conclusion of your event, please complete this evaluation form. Your volunteer list will also help us make sure we don't miss any volunteers when it comes to appreciation-time at the end of the year. Thanks!*

1. Event Basics

Name of Event:

Date:

Day of Week:

Time:

Location:

Chairs:

Basics Feedback:

Was there anything involving the when and where that was particularly positive?

Was there anything involving the when and where that was particularly negative?

2. Communications/Promotion

What tactics (flyers, email, posters, etc.) did you use to promote this event/effort? And what did and did not work well?

What was your timing on communications? Too early? Too late? Any learning for next year?

3. Event/Effort Execution

How was participation/attendance? (specifics, if possible):

Was there a cost to attend or participate?

Expenses for running the event (Items Needed & Cost)

Key Steps before Event:

Key Steps during Event:

How Many volunteers did You Have? _____ How many volunteers would you have preferred? _____

4. Overall feedback.

Key: Overall comments on successes/failures of the event. Anything you'd do differently? Anything that did or did not work particularly well? Did you have enough help? Suggestions for next year?

Any Key feedback as heard from Faculty, Staff or Families?

Should PTA run this event again next year?
Did you have a budget big enough to fund this event?
If no, how much more should be considered for budgeting?

5. Volunteers

Please list all volunteers who helped in any way with the event. If possible, please also list function.

Volunteer Evaluation Form 2012-13

Thank you so much for volunteering your time to help with this PTA Event.
We are always looking to improve PTA events, so your feedback is greatly appreciated.
Thanks, (PTA Development Team)

Your Name: _____ Phone Number: _____

Name of Event: _____

1. What is your overall assessment of how the event flowed?
2. What was your role (responsibilities/duties)?
3. Were you set up to succeed in your job with guidance, instructions, materials, etc.? If not, what more could have been done to help you?
4. If you were instructing the next person to do this job, what would you tell him/her?
5. How could events like this be improved in the future?
6. Anything else that you'd like to say?

Thank you for taking the time to fill out & reply back. You are helping the PTA create successful events.

Volunteer Self Evaluation Form

The purpose of this appraisal is to maintain good communication with our PTA members and to improve your PTA experience as well as improving the services we provide.
As part of our continuous improvement program we request that you complete this self appraisal and bring it to discuss at our appointment on *(insert appointment time)*.....

Signed Membership Chair.....

Volunteer Name:

Office held:

Date of appraisal:

What do you enjoy most in your role with PTA?

Which part of your PTA role do you feel you do well?

Which part of your PTA role do you feel you could do better?

Are there any factors that make your role easy or difficult?

Are there any aspects of your role in which you would benefit from further support/training?

Do you wish to:

- continue in this role?
- develop this role further?
- vary your role?
- act as a buddy for new volunteers?
- move into a different role?
- take on greater responsibility?
- contribute less/more time?

Any further comments?

Signed: Volunteer:.....

Date Developed _____

Signed _____

Date Reviewed _____

Signed _____