

***Introduction to Volunteer & Coalition Member Engagement***

Webinar Summary December 4, 2014

**Presenters:**

**Winifred Quinn**, Director of Advocacy & Consumer Affairs, the Center to Champion Nursing in America

**Susan Reinhard, PhD, RN, FAAN** Senior Vice President & Director, AARP Public Policy Institute; Chief Strategist, Center to Champion Nursing in America

**Susan B. Hassmiller, PhD, RN, FAAN** RWJF Senior Adviser for Nursing; Director, Future of Nursing: *Campaign for Action*

**Alexia Green, RN, PhD, FAAN** Professor and Dean Emeritus, Texas Tech University Health Science Center

**Mary Dickow, MPA, FAAN** Statewide Director California Action Coalition

**Terry Edwards** Advisor for Innovation Office of Volunteerism and Services AARP

**Webinar Goals**

This webinar on volunteer and coalition member engagement will provide an opportunity for participants to:

- Share successes and learn about opportunities for enhancing volunteer engagement.
- Identify factors associated with effective volunteer and coalition member engagement.
- Provide information about how we can develop and deliver effective technical assistance in this area.

Across the country, there is a movement to advance the field of nursing so that all Americans have access to high quality, patient-centered care in a health care system where nurses contribute as essential partners in achieving success. This national level [Future of Nursing: Campaign for Action](#) is a result of the Institute of Medicine's landmark 2010 report on the [Future of Nursing: Leading Change, Advancing Health](#).

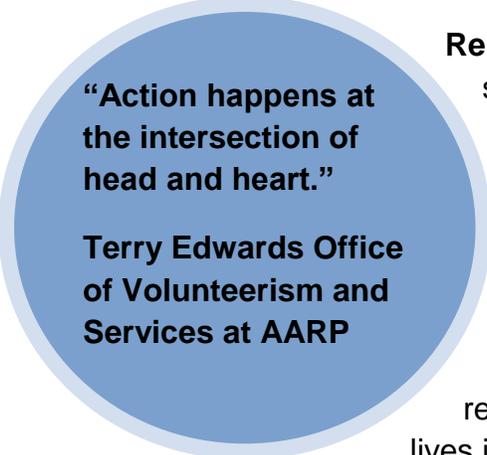
The *Campaign for Action's* field-based teams, the [Action Coalitions](#) (ACs), are leading this movement and are equipping themselves with knowledge gained from technical assistance provided by the Center to Champion Nursing in America (CCNA), a joint initiative of AARP, the AARP Foundation, and the Robert Wood Johnson Foundation. Such technical assistance comes in the form of webinars, face-to-face interactions, and other facilitated engagements with public policy leaders, content experts, consultants, and Action Coalition peers across the country.

Action Coalition members and volunteers are the driving force of the *Future of Nursing: Campaign for Action*. This webinar will also explore volunteer management themes, ask you about your experiences, and provide a broad overview of factors associated with sustainability and enhanced volunteer engagement.

At the beginning of the webinar began, **Quinn** of AARP and CCNA presented a poll question to the audience: “Have you ever had any volunteer engagement or management training?”

The result: Yes - 10; No - 12; No Answer - 13.

A follow-up poll asked how many have a volunteer engagement plan in place. The result: Yes - 4; No - 19; No Answer - 16.



**“Action happens at the intersection of head and heart.”**

**Terry Edwards Office of Volunteerism and Services at AARP**

**Reinhard** of AARP noted that The *Campaign for Action* is starting its fifth year and a national level focus is on Action Coalition sustainability.

“We want all of you to have an infrastructure in place that will allow you to continue to advance education progression, develop nurses as leaders and secure their board appointments, and of course follow through on all of the IOM’s recommendations. (The result is) that everyone in American can live healthier lives in a culture in which nurses are essential partners in providing care and promoting health.”

To be sustainable, Action Coalitions must have a strong framework in place that includes funding and effective strategic stakeholder engagement including the knowledge of how to best recruit and deploy individuals and organizations on behalf of the Action Coalition.

**This recruitment and deployment of individuals and organizations is what we consider volunteer engagement.**

**Hassmiller** of RWJF said volunteers truly are the driving force of this *Campaign*.

“You are the boots on the ground who are leading transformative work in your state and nationally to improve health and health care for everyone in this country.”

“Whether you are your Action Coalitions co-lead, a steering committee member, a nurse champion, a student, a leader or supporter of a workgroup, I bet you are doing this work because you are passionate and committed to improving access, value, and quality of care.”

She said that in conversations with Action Coalitions across the nation, one of the priorities often cited is to strengthen infrastructure and sustainability.

**Hassmiller** gave a broad overview of themes regarding volunteer engagement within the *Campaign*.

These themes have been identified through TCC Group’s conversations during their formative evaluation of the *Campaign* as well as anecdotal evidence received directly from Action Coalition members.

### First theme: Structure

- ✓ Members generally understand their roles and responsibilities. (75% of members agreed that participants clearly understand their roles and/or obligations);
- ✓ Action Coalitions have reported there has been an increase in member participation. (67% agreed that the Action Coalitions had increased participation of members).
- ✓ An opportunity exists to enhance engagement by clearly outlining expectations for members and volunteers and identifying “meaningful and consistent opportunities for active engagement.” (TCC Group, December 15, 2013, p. 12)

### The next theme: What’s in it for Me?

- ✓ Most AC members feel they get something out of their commitment to the Action Coalition. However, there are opportunities for enhancing volunteer/member satisfaction by clarifying “what is in it for the volunteer”.
- ✓ Most members (67%) agree that they feel like they benefit from their participation in an Action Coalition.
- ✓ Some members (over 30%) could not articulate the benefit they get from their participation. This means there is a great opportunity for identifying what volunteers and members can gain from working with their Action Coalition.

### A third theme includes: recruitment, retention and succession planning.

- ✓ Most Action Coalitions agreed they need more non-nursing related organization involvement with their coalition. “[M]aking the case for engagement” was anecdotally noted as one barrier to engaging nurse champions (p. 13). Here again is another opportunity for us to be able to figure out how connecting with their Action Coalition is beneficial to both volunteers and coalition members.
- ✓ Recognizing volunteer and coalition member contributions is also something that is key to sustaining engagement.
- ✓ Having a plan in place that enables smooth transitions when leaders, coalition members and volunteers change is something that many of you have shared with us as a need.

Common threads that are relevant to structure, identifying “What’s in it for me?”, recruitment, retention and succession planning are: leadership and communication.

In her experience in Texas, **Alexia Green** of Texas Tech says it’s important to have an application for potential volunteers and organizations to join the coalition. Identify one or two themes or topics their organization can work on and link these organizations to others. Also, it is better to recruit an organization instead of an individual.

**Mary Dickow** of the California Action Coalition said the coalition is highly structured on goals and work plans. “Our leaders are motivated by passion and energy.” As one of the oldest Action Coalitions, California has collected a data base of several thousand volunteers. And on its website [www.CActioncoalition.org](http://www.CActioncoalition.org) there is a “Get Involved” tab for volunteers.

“Keeping people engaged is a real challenge,” she said. One way is to have regional meetings that bring people together and keep interest alive.

Mary also mentioned malechimp.com as a way to organize a volunteer data base.

**Terry Edwards** of the Office of Volunteerism at AARP began her presentation from the 30,000 foot level by offering practical steps in helping Action Coalitions attract volunteers and maintain their interest.

“Our first inclination is to begin with the challenges or what’s wrong with the current situation.” But there is a more productive way to begin, that you can employ right now with the people you already have around the table. This technique can connect them to your efforts in very powerful ways, she said.

Think for a moment about the challenges you face in your Action Coalition. How does that make you feel? Where does it take your thinking? How does it even feel in your body?

Edwards says to try a methodology that changes the dynamic of the discussion at the outset, starting with a different line of questioning and exploration.

- ✓ What kind of Action Coalition do you want?
- ✓ Why is that important to you? Others?
- ✓ How is that different from how you see things now? What are some of the things that need to happen to create the kind of AC you want? What should/could we do about it?

“Imagine how this might play out with a group of your existing volunteers and partners. It changes the discussion from deficit to possibilities.”

This model is based on 20 years of community engagement practice by the Harwood Institute for Public Innovation. Just the act of including your existing participants strengthens volunteer engagement. This technique can be done with community and organizational partners as well.

What has been learned in the Office of Volunteerism over time are two perspectives – two frameworks that can help replicate volunteer, community and even partner engagement. They are **success factors and engagement practices**.

Coming down to the 10,000 foot level, Edwards says that ultimately, the goal is to have folks raising their hands to be a part of your Action Coalition. “We’ve learned some things over time that can help ensure that happens...if we discipline ourselves to pay attention to them.”

### Success Factors

1. **Set clear focus.** Know what you want and need to do with certainty. Use the answers from the first activity. Or transport yourself to five years in the future, look back knowing that everything happened like clockwork, and be specific at what you see. What did your Action Coalition accomplish? What are people saying about it? Who is a part of it?
2. **Prepare for success.** If you attracted all of the volunteers you set your mind to, would you be ready for them? Would you have the infrastructure to welcome,

support, and train them? Would there be enough meaningful work for them to do so they stick around? **Warm body recruitment is your enemy.** When people leave, they rarely come back and they tell others not to waste their time.

3. **Explore mutual aspirations.** Refocus from what the Action Coalition needs/wants to get out of it and have a conversation about what the volunteer wants to get out of it. Why are they even considering saying yes? What intrigues them. **Listen, Learn, and Leverage – listen to their goals and aspiration, learn where the natural points of intersection are, leverage a more authentic, mutually beneficial relationship with them.**
4. **Target head and heart.** Balance left brain and right brain aspects of the work and the experience. The left brain focuses on accomplishment of goals and how things get done. The right brain focuses on impact and how it makes people feel. **Action happens at the intersection of head and heart.**
5. **Take measured steps.** Build up to bigger asks – like the trying on of leadership that was mentioned earlier. Start small, make it a great experience, and move them along a ladder of engagement.
6. **Celebrate positive impact.** Share, report, celebrate the bottom line impact – that can be expressed in both a left brain and right brain way. Left - How many people did we impact? Right – Publicize stories about impact.
7. **Encourage fresh innovations.** Routinely look for what's next and invite people to change the world, building on successes and strengths. But build this discussion into your process on a regular basis.
8. **Provide consistent connections.** Ping them with information regularly. Include some kind of doable call to action. The ping should give them something to consider, think about, and do.
9. **Honor engagement stages.** There is a disciplined way to get to the nitty gritty of volunteer engagement that you can replicate on the ground – the Volunteer Engagement Cycle (VEC).

These top three stages are your golden zone – **determining your needs, designing work for volunteer involvement and marketing and recruiting.**

Recruitment is a major part, but our experience tells us that if you skip the first two stages, you run the risk of warm body recruitment, selecting the wrong person for a

particular role, not having meaty work for them to do. It is the 80/20 rule. If you spend 80% of your efforts on the first two, the rest falls into place in a powerful way.

### **Determining Your Volunteer Needs**

This should be the starting point for your efforts, to make sure you are matching volunteer involvement to the initiatives you want to implement as part of your state planning.

Remember, that we are not just after volunteers for volunteers-sake, but to help us move forward on AARP objectives and initiatives. This step will also help you later in the cycle when you begin to design volunteer roles and target your recruitment efforts.

### **Designing Work for Volunteer Involvement.**

Some jobs are do-able by volunteers, and some are not. Look at those projects and activities that are most appropriate for volunteers and ways you can organize the work in small “chunks,” particularly for “episodic” volunteers that can give a few hours here and there, and who increasingly make up the ranks of today’s volunteers. Use a simple, clear position description to describe the scope of work the volunteer will do. Here is where the structure begins to take shape.

### **Marketing and Recruiting.**

Once you’ve identified the work to be done, who do you want to do it and how will you let people know about your opportunities? Look at the various audience segments in your area that might be interested in your Action Coalition. Identify the benefits of volunteering you can offer to each segment and creative ways to structure your recruitment message that will catch their attention.

### **Matching volunteers with Opportunities.**

Here is where you determine the right “fit” between the opportunity you have and what the potential volunteer is looking for. Sometimes this is easy and clear. Other times you may need a more formalized interviewing or screening process, particularly when you are recruiting for leadership roles.

### **Providing Orientation and Training.**

Just like employees coming into a new job, new volunteers need to be oriented and trained to their role and responsibilities. Orientation and training tend to work best when

they are “just in time,” meaning that a volunteer can put the new knowledge and skills to work right away.

### ***Achieving Volunteer Performance.***

Similar to employees, volunteers need feedback and periodic assessment on their performance. Your volunteers are smart people and using coaching techniques provides an effective way to enable them to do their best work. Likewise, you want to receive feedback from volunteers about their experience, formally and informally – create an open feedback culture. This will help you agree on ways to ensure success and make volunteering valuable for everyone.

### ***Recognizing and Retaining Volunteers.***

Recognition and retention tend to go hand in hand. Recognizing and thanking volunteers at different times and in different ways can be a strong motivator for individuals to stay involved. No one size fits all. Be creative.

### ***Evaluating and Fine-tuning Your Efforts.***

Take some time periodically to evaluate how well your volunteer initiatives are working and what you can do to fine-tune and improve your approach. Here is where an openness and even a hunger for innovation is important.

Some questions to consider:

- ✓ What kind of Action Coalition do you want?
- ✓ Why is that important to you? Others?
- ✓ How is that different from how you see things now?
- ✓ What are some of the things that need to happen to create the kind of Action Coalition you want?
- ✓ What should/could we do about it?

**Quinn** of AARP acknowledged that we have just started to scratch the surface of this important topic and we will be developing resources on volunteer and coalition management in 2015 and look forward to sharing them with you.

“We encourage you to share your knowledge, experiences, resources and challenges with our Action Coalition community.” A few ways to do that include posting to the

website, sharing on the Facebook page, or emailing them to Winifred Quinn [wquinn@aarp.org](mailto:wquinn@aarp.org) or Cordelia Hill [chill@aarp.org](mailto:chill@aarp.org).

The IOM's recommendations include: the need for more advanced education of registered nurses; nurses leading innovations in health care and being appointed to decision making bodies; all nurses practicing to the full extent of their education and training; a more diverse nursing workforce and faculty; and more interprofessional collaboration among nurses, physicians, and other members of the health care team in the educational and clinical environments.

For more information from the Center to Champion Nursing in America about this webinar, technical assistance or other questions related to the Future of Nursing, Campaign for Action contact Michael Pheulpin at [MPheulpin@aarp.org](mailto:MPheulpin@aarp.org) or 202-434-3882 or Andrew Bianco at [abianco@aarp.org](mailto:abianco@aarp.org)

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