

# Chapter Volunteer Engagement Toolkit



# Introduction

## Welcome to the Chapter Volunteer Engagement toolkit!

As a chapter leader, you have already made the leap from member to engaged volunteer. But your role may require that you recruit, organize, and lead other volunteers. This toolkit provides information and documentation related to the “Four Rs” of volunteerism at PMI – *Recruitment, Retention, Recognition and Relationships*. Thank you for your time and commitment as a chapter leader and your interest in promoting local engagement and managing volunteers effectively.

### Let's get started!



# How to Use this Toolkit



This toolkit is designed to provide you with the necessary information and tools to nurture a successful volunteer community within your chapter. The recommended first step is to start with the tab labeled [Volunteerism at PMI](#). This section will provide an overview of the value, history and structure of volunteers within the Institute.

The next three tabs will provide you with information and documentation regarding how effective [Recruitment](#), [Retention](#) and [Recognition](#) efforts will support positive and productive *Relationships* with your volunteers.

Finally, take a look at the [Your Team](#) and [Additional Resources](#) tabs. These sections will provide internal and external volunteer management resources and existing chapter volunteer documentation.

To access any of the documents referenced in this toolkit, click on the link provided, which will bring you into PMI's Marketing Portal. Click the download button to download, edit and save for your chapter's use.

# Volunteerism at PMI

## Volunteer Service Excellence

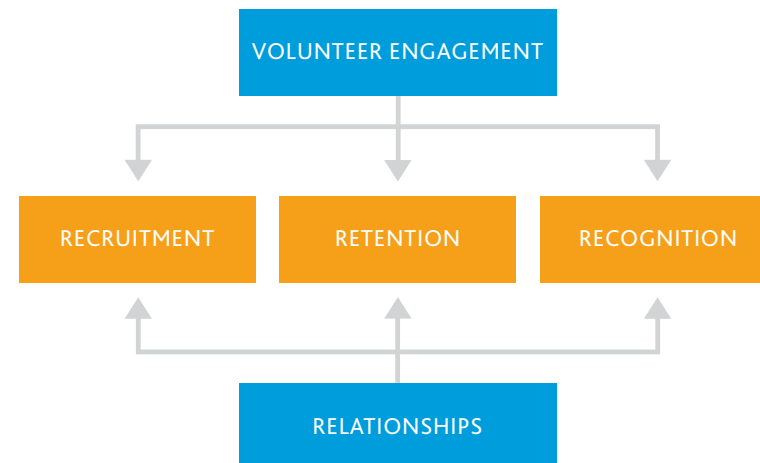
*Volunteers and effective volunteer partnerships with staff are the best way to accomplish the Institute's goals and objectives.*

(PMI Core Value, Strategic Plan, 2011 rev)

PMI is, was, and always will be about volunteers. Founded in 1969 by five volunteers who sought to standardize and promote the project management profession, PMI's volunteer force, upwards of 10,000 strong, is larger than many other professional membership associations. PMI is dedicated to supporting the volunteers around the globe that make PMI the dynamic organization that it is. Volunteerism is so important to PMI it was added as a Core Value in 2011. Since that time PMI has worked diligently to provide additional support, expanded resources and increased opportunities for leadership development to our volunteers.

Volunteer engagement includes Recruitment, Retention and Recognition efforts. At PMI, the Volunteer Engagement Model illustrates that the first 3 Rs are built upon a foundation of another R – for Relationships. The relationships we build with our volunteers ensure that we work together effectively in order to accomplish our goals.

It's important to keep in mind that this is not a linear process. All of the "Rs" are connected and inter-related. Recruiting the right volunteer is the first step to retention, and appropriately recognizing volunteers leads to higher volunteer retention, and so on.



# Recruitment

## Volunteerism 101: Recruitment

- Goal is to find work that is meaningful to both the volunteer and the organization
- Attracting volunteers begins with an organization's reputation, profile and mission
- Word-of-mouth, internet, live presentations, events and paid ads are top 5 recruitment methods
- Motivators include: values, understanding, personal development, community concern, and esteem enhancement


Recruitment, like everything in the volunteer engagement model, is based on relationships. The goal of recruitment is ultimately to find work that is meaningful to both the volunteer and the chapter.

Recruitment starts before you even think about specific opportunities: it begins by building a “pipeline” of potential volunteers. Your membership is a great place to start: chapter events and meetings are always opportunities to talk to potential volunteers.

Before you begin actively recruiting, the process starts with identifying the specific volunteer need and the resources to support the volunteer. Prior to active recruitment, your chapter will need to identify:

- The purpose of the volunteer opportunity
- The experience, skills, and time required
- How success will be measured
- Who the volunteer will report to

By answering these key questions, you will then be able to effectively create a specific job description for your volunteer opportunity.



Think of recruitment as “matchmaking” for your chapter: you want to find the right “partner” to help your chapter grow, and similarly, your volunteer is looking for something in return. Taking time to get to know potential volunteers will help you make the best “match” for your chapter. This can be done through in person or phone interviews, or more casually at chapter events.

# Recruitment

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## Recruitment Tools

There are several tools offered to help you recruit volunteers for your chapter.

First, check out the [Value of Volunteering PowerPoint](#), which describes the overall benefits of getting involved as a volunteer. There's also a [video](#) and a [flier](#) you can customize to help promote volunteerism among your members.

PMI's official volunteer recruitment tool is the Volunteer Relationship Management System ([VRMS](#)). The system allows chapters to tap into the tens of thousands of interested individuals who have expressed an interest in volunteering with PMI.

Check out the following VRMS-related assets:

- [VRMS Basics PowerPoint](#)
- [VRMS Posting Template](#)
- [Letter to Interested Volunteers](#)
- [VRMS Ad \(for use on chapter website\)](#)
- [Searching and Updating Profile Tips](#)

The [Chapter Role Delineation Study](#) includes detailed descriptions of 14 important chapter volunteer roles that directly support effective chapter management. Templates for each of these roles are available to copy and post as chapter opportunities in the VRMS.

# Recruitment

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Individual volunteer service history is maintained in the VRMS, and chapters have access to overall volunteer data via reports that can help track volunteer contributions so you can recognize your volunteers effectively. VRMS reports available to chapters include:

- **VRMS Chapter Opportunities** – Current status of each opportunity posted by the chapter, applications submitted, etc.
- **Volunteer Contact List** – Current chapter members who have updated their profile in VRMS.
- **VRMS Active Profile detail Report** – Shows not only current members, but also prospects in your chapter's territory who have updated their VRMS profile
- **VRMS Active Member Service History Report** – Lists all volunteers with any service history within a designated timeframe, whether it was assigned via VRMS, came in from the CS, or was manually entered by the volunteer. This report shows any of your current members who have history within those dates, even if the role was done on behalf of GOC or another chapter.
- **Volunteer List by Provider** – Lists all volunteers assigned via VRMS with service history within the designated timeframe. This report only shows people with service history that was assigned via a VRMS opportunity.

For questions regarding the Volunteer Relationship Management System (VRMS) including information on how to get started, please contact [volunteer@pmi.org](mailto:volunteer@pmi.org).

# Recruitment

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## Did you know that onboarding is also part of the recruitment process?

A warm welcome with an orientation to the new volunteer role will go a long way to ensuring the start of a positive volunteer experience. Whether you schedule monthly in person orientations for new volunteers, or review a PowerPoint over the phone, all new volunteers should receive an orientation to their role. Check out this [sample orientation PowerPoint](#) to help get you started. [The Chapter Leader's Guide: Strategies for Onboarding and Transitioning](#) is a valuable resource for onboarding new elected or appointed chapter Board members.

Onboarding paperwork is also part of recruitment. We strongly recommend that all chapter volunteers (not just board members) review and agree to abide by a volunteer code of conduct, and conflict of interest/confidentiality policies. All volunteers who have access to member and sensitive data are required to have read and understand, and agree to abide by confidentiality and data usage agreements as outlined in the Policy Manual for PMI Chapters.

- [Conflict of Interest Sample to be adapted by Chapter](#)
- [Confidentiality Agreement to be adapted by Chapter](#)
- [Policy Manual for PMI Chapters](#)

Once the signed documents have been collected, they should be reviewed to evaluate any responses that may prompt the need for further clarification and/or discussion with the volunteer. Then the signed copy should be kept on file by the chapter.

In the retention tab, you'll read about what motivates people to volunteer for PMI, and what your chapter can utilize to ensure their work is meaningful and productive.



# Retention

## Volunteerism 101: Retention

### VOLUNTEERS ARE MOTIVATED BY...

- Opportunities to learn new skills
- Opportunities to "change the world"

### VOLUNTEERS STAY IF...

- Their tasks and procedures are clear
- They feel welcomed and appreciated
- They bond to someone within the organization
- They receive feedback that connects their job to program success
- They have a voice in the organization

## ***What is retention?***

*Simply put, it's the ability to keep your volunteers engaged in your chapter by developing them for future volunteer roles and providing opportunities for leadership development. One aspect of retention is satisfaction, and satisfaction comes with expectations being met.*

The first step to retaining volunteers is ensuring that the job description and expectations you created in the recruitment phase are clearly communicated to your volunteers. Additionally, it's important to regularly check in with your volunteers to make sure that their expectations and the chapter's needs are being met. This regular communication will allow you to "course correct" if needed, and will help to support and retain your volunteers.

As a volunteer yourself, you probably have a sense of why someone would volunteer in the first place. Think back to when you first decided to volunteer with PMI. What motivated you to get involved? We know that generally speaking our volunteers decide to get involved for 3 key reasons:

- Build a Professional Network
- Gain Skills and Experiences
- Develop as a Leader

# Retention

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While it's easy to understand someone's general motivations for getting involved, we know from our Volunteer Satisfaction Surveys that there are specific factors that lead to a volunteer experience that is successful and productive:

- They feel that their contributions were valued by PMI/chapter.
- They feel that their contributions were valued by fellow volunteers.
- Their experience as a volunteer met their overall expectations.
- The missions, objectives and deliverables of the group they participated in were clear.
- The assigned tasks were completed in a timely manner.
- Their role was meaningful and personally valuable.

Once volunteers have accepted their role and you've provided them with an orientation, what else is needed to keep them satisfied? Be sure to include your volunteers at all chapter meetings, professional development opportunities and any networking events that might enhance their overall experience. PMI also offers Chapter Leaders in person Leadership Institute Meetings (LIMs) and Leadership Institute Region Meetings that provide leadership development and association management content. All volunteers have access to any virtual coverage of the events, and educational content on [PMI Learn](#).

# Recognition

## Volunteerism 101: Recognition

- The first, and easiest way is to say thank you – and mean it. A simple thank you, on the phone, in person, or in an email goes a long way in making a volunteer feel appreciated.
- When thanking volunteers, it is important to give them the context and explain exactly how they have contributed and the impact it has made to the chapter.
- Above all, recognition should be timely and consistent. It doesn't have to be complicated or expensive.

In all aspects of our lives, we like to be recognized for the work we do. Volunteer recognition is no different. It comes in many forms, both formal and informal. You can probably think of several ways you personally would like to be recognized as a volunteer.

We know from Volunteer Satisfaction surveys that volunteers would most like to be recognized by receiving PDUs. Volunteers earn PDUs for their volunteer service, so one of their expectations is already being met!

**PMI VOLUNTEERS HAVE ALSO TOLD US THAT THE FOLLOWING TYPES OF RECOGNITION ARE APPRECIATED:**

- Printed name in a PMI publication
- Receive a certificate or letter/email of appreciation
- Receive gifts, such as pins, plaques, PMI shirts or books
- Volunteer team recognition dinner or banquet

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## RESOURCES FOR YOU TO USE IN SUPPORT OF ONGOING VOLUNTEER RECOGNITION.

- [Certificate of Appreciation](#)
- [Letter to Employer](#)
- [PDU Letter](#)
- [Holiday Letter](#)
- [Recognition Event Invite](#)

# Your Team

This toolkit has provided you a wealth of information to help you recruit, retain and recognize your volunteers. In the final pages you will find additional resources and contact information to further assist you.

Your first point of contact should always be your assigned staff and regional volunteer. As stated in PMI's Core Values, the relationship between staff and volunteers is critical and a primary focus in PMI's volunteer efforts. We encourage you to take advantage of the resources available to you (as outlined in the chart below) from your Chapter Partner, Chapter Administrator and Region Mentor. To determine who the key contacts are for your chapter, please email [ChapterSupport@pmi.org](mailto:ChapterSupport@pmi.org).



CHAPTER PARTNER (STAFF)	CHAPTER ADMINISTRATOR (STAFF)	REGION MENTOR (VOLUNTEER)
<ul style="list-style-type: none"> <li>Strategic/Business Planning</li> <li>Volunteer/BOD Transition Planning</li> <li>Evaluate Results; Drive New or Improved Plans</li> <li>Support Leadership Institute Region Meeting Planning &amp; Implementation</li> <li>Support and Provide Connections for Chapters to Leverage PMI Tools and Resources</li> </ul>	<ul style="list-style-type: none"> <li>PMI Chapter Information Reorganization &amp; Processes</li> <li>Charter Renewal</li> <li>Bylaws/Governing Documents</li> <li>Administer Electronic Elections, Surveys, Taxes and Insurance</li> <li>Support Chapter Leaders with Online Community Sites and Component Systems (CS)- Chapter Reporting System</li> </ul>	<ul style="list-style-type: none"> <li>Networking &amp; Collaboration</li> <li>Support Strategic Business Planning</li> <li>Advice &amp; Coaching</li> <li>Responsible for Leadership Institute Region Meeting Planning &amp; Implementation</li> <li>Presidents &amp; Other Leader Call</li> </ul>

# Additional Resources

For general information about PMI Volunteer Programs and Services, contact [volunteer@pmi.org](mailto:volunteer@pmi.org).

## PMI Community Leadership Site

The [PMI Community Leadership Site](#) is an online community available to current chapter leaders. Access is granted based on current volunteer information entered in PMI's Component System (CS). The site provides information on PMI chapter policies, processes, and best practices and offers chapter leaders a chance to collaborate and converse via discussion boards. In addition, there are Region-specific online community sites available. For questions about the sites or access, please contact [chaptersupport@pmi.org](mailto:chaptersupport@pmi.org).

## Leadership Institute

PMI's Leadership Institute program is our investment into the enrichment of our most valuable resource – our volunteers. The purpose of the program is to develop PMI members into stronger, more effective volunteer leaders. Leadership Institute offerings are designed to expand your network and provide knowledge to help you develop as a leader with your PMI chapter and in your professional career. [Learn more about the Leadership Institute.](#)

## PMI Learn

Whether new or an experienced veteran, volunteers can enhance their leadership skills using [PMI Learn](#), our e-learning environment for volunteer leaders.

## Chapter Samples

- [Montreal Chapter Volunteer Management Guide](#)
- [Montreal Chapter Individual Volunteer Guide](#)
- [Montreal Chapter Volunteer Flier](#)
- [Fort Worth Chapter Volunteer Management Guide](#)
- [Fort Worth Chapter Volunteer Program Brochure](#)
- [Buffalo Chapter Volunteer Organizational Chart](#)
- [PMI Madison SC WI Chapter VRMS Strategies](#)

If your chapter has samples that you would like to be considered for inclusion in this toolkit, please email them to [volunteer@pmi.org](mailto:volunteer@pmi.org).

## Artwork

- [Volunteer T-Shirts and Button Artwork](#)

## External Volunteer Engagement Web Resources

Energize: [www.energizeinc.com](http://www.energizeinc.com)

VolunteerMatch: [learn.volunteermatch.org](http://learn.volunteermatch.org)