

Virtual Training Series

# Volunteer Recruitment and Retention, Part II

What Really Works

Center on Budget & Policy Priorities

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Utah Basin  
Association

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Baltimore CASH  
Campaign

**Keely Andrews**

Enterprise Community  
Partners, Inc.



Tax Credits  
for People  
Who Work

# The Get It Back Campaign

- National effort to connect eligible workers to tax benefits
- Promote the Earned Income Tax Credit, the Child Tax Credit, free tax preparation, and other tax benefits
- Work with a network of diverse partners
- Provide outreach tools, trainings, and resources to help you link eligible workers to the tax credits and free tax help

[www.eitcoutreach.org](http://www.eitcoutreach.org)



# Volunteer Resources

Volunteer Resources

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# Today's Presenters



**Lauren Schwanz**  
VITA Regional Coordinator  
Uintah Basin Association of  
Governments



**Sharon Baldwin**  
VITA Coordinator  
Baltimore CASH Campaign



**Keely Andrews**  
Program Associate  
Cuyahoga EITC Coalition

# Volunteer Recruitment

Lauren Schwanz  
VITA Regional Coordinator  
Uintah Basin Association of Governments



# "WHERE DO I START?"

- Who are you trying to recruit?
- Where can you find these volunteers?
- How can you sell this opportunity to THEM?
- What will “seal the deal” for these volunteers to commit to your program?
- How can you make this experience \_\_\_\_\_ for the volunteers?  
(positive, worthwhile, fun, heartwarming...)

## *Example:*

- Students majoring in Accounting
- Colleges- USU, UBATC, etc.
- This is a great resume builder, stand out from other applicants, apply skills, etc.
- College credit? Letter of recommendation? Reference on resume? Certificates?
- Retention piece!

# BEFORE APPROACHING PARTNERS

- Find your “in”
  - Know your intended audience and have your “in” guide you to the best person to assist you.
- Have your “spiel” together
  - A message that you can instantly share with potential partners that will explain why you are reaching out to them and why it is important.

*\*HINT\* Having a planned message at hand helps you spread the information effectively, while conveying a professional and knowledgeable demeanor.*

# BEFORE APPROACHING PARTNERS

- How does this partnership benefit both parties?
  - Emphasis on how VITA/volunteering can specifically better a business/organization is key, along with the benefits the community will receive as a result.
- Keep it light
  - Volunteering should be fun, so make sure you bring elements of excitement and reward to the table.

*Displaying your personality is a must. Trust and “buy-in” happen when we act like ourselves, not some other version.*

# BUILDING THE PARTNERSHIP

- Check in with partners and keep them updated
  - They want to help you, let them; but don't expect anything or you will burn them out.
- Build relationships
  - Partners are people who truly care and have the same desire for success. Treat them as well as you would volunteers.
- What can I do for you?
  - Asking partners how you can help them is an investment in the help you will receive in the future.
  - RETENTION PIECE FOR VOLUNTEERS!

# DIFFICULTIES IN RURAL AREAS

## • Pro's

- Businesses more likely to assist community
- People know each other and know what's available
- Ability to build stronger ties with individuals/groups/businesses

## • Con's

- Small number of businesses to support community
- Lack of community support from individuals
- Distance/time between home and volunteer opportunity
- People get burnt out on volunteer efforts

# VOLUNTEER RETENTION

- A great many thanks...
  - Find out what way(s) volunteers want to be thanked and implement
  - Continually recognize the volunteer efforts (give praise like candy, or actual candy)
  - Show your appreciation in actions and deeds
  - Make time for volunteers
  - Invest in your volunteers, they have invested in you
  - Use technology to your benefit
    - Example: text a volunteer to wish them a happy birthday
  - Show your support or stand up for them

# REMEMBER:

- Volunteers are not paid.
- Volunteers are not selfish with their time or hard work.
- Volunteers are the **REASON** for VITA success.

# FOOD FOR THOUGHT:

It takes a special kind of person to become IRS certified in Tax Law, donate countless hours away from their life and family over a 4+ month span, complete strangers' tax returns, and put up with some of the VITA clientele and problems that we as RC's struggle with even when we are getting paid...

VITA volunteers are simply amazing.

# QUESTIONS? CONCERNS? EMOTIONAL OUTBURSTS?

Feel free to contact me if there is anything which I can do for you!

- [Laurens@ubaog.org](mailto:Laurens@ubaog.org)
- [UtahTaxHelp.org](http://UtahTaxHelp.org)
- [UBAOG.org](http://UBAOG.org)

# Volunteer Relations



Sharon Baldwin, Volunteer Coordinator  
Baltimore CASH Campaign  
[Sharon@baltimorecash.org](mailto:Sharon@baltimorecash.org)



# Baltimore CASH Volunteer Program



- Foundation
- Recruiting and Retaining Volunteers
- Volunteer Pipelines
- Messaging & Volunteer Motivation
- The Volunteer Experience & Creating a Culture of Appreciation

# Volunteer “Basic Needs” (Tax Site Manager Training)

- Clear instructions
- Feedback – early and often
- Breaks & varied shifts
- Thank you’s and connection to the mission



# Pratt Directions

Search this site

Enoch Pratt Library  
Directions  
Sitemap

## Enoch Pratt Library Directions



The Enoch Pratt Central Branch is located at [400 Cathedral St, Baltimore, MD 212](#)

### Baltimore CASH Staff on-site:

- Veronica Purcell (Site Manager)
- Kendra Watts (Site Manager)

**Tax Site Location:** The tax site is located in the Maryland Room on the second floor of the library. As soon as you enter the lobby near the guards, turn right and go to the second floor (stairs or elevator available). Make a right after you get on the second floor. The Maryland Room is at the very end of the hall. If you have trouble finding it, go to the information desk, let them know you are a volunteer, and ask them for help finding it. (If you still have trouble, you can always call or email me).

**Parking:** On Saturdays, the Franklin St Garage at [15 W Franklin St](#) offers flat rate \$5 parking and is conveniently located less than a block from the library (walking directions between the garage and the library are available [here](#)). Volunteering during the week? Be sure to check the posted rates as parking downtown is more expensive (All day rates as of 1/2015 are \$10/day)

**Public Transportation:** The library is accessible via many bus routes and Charm City Circulator Routes as well as walkable from Light Rail and Metro Subway. Check out the MTA's [website](#) or the Charm City Circulator's [website](#) for detailed information from your location

**Questions?** Contact Sharon Baldwin, Volunteer Coordinator, at [sharon@baltimorecash.org](mailto:sharon@baltimorecash.org) or 410-234-2804 (weekdays) or 443-240-1617 (Saturdays)

# Messaging what volunteers say about volunteering with Baltimore CASH:

- **“Every tax return is like an adventure”**

As a Tax Volunteer with Baltimore CASH you'll become an IRS certified tax preparer through the IRS's Volunteer Income Tax Assistance (VITA) program, do good in Baltimore, and make a measurable difference in the lives of low income households in Baltimore.

- **“Excellent! Very well run and I felt like I was really able to help right away.”**

Tax Volunteers help clients get valuable credits that put money directly into Baltimore households who need it most.

- **“Fantastic. I can relate it to my school work.”**

Student volunteers in accounting, business, law and related majors get an opportunity to gain valuable tax preparation experience working directly with clients while doing good in Baltimore.

- **“This is an excellent program and it is a privilege to be a part of it each year.”**



### February Spotlight: Volunteer Couples!

In honor of Valentine's Day we'd like to take some time to recognize and highlight couples who volunteer together at Baltimore CASH.

Volunteering can be a great way to meet someone special or to spend some quality time with your boo!

Volunteers Susan Francis, Deputy Director of the Maryland Volunteer Lawyers Service, and Sandy Daniels (right) spend several Saturdays during tax season volunteering together at Enoch Pratt.

This couple has volunteered with Baltimore CASH for two year and, even with law and financial day jobs, have enjoyed learning new skills as Tax Volunteers.

Susan says of volunteering together at CASH, "Sandy and I both share a deep commitment to giving back to others that need assistance. Volunteering for Baltimore CASH Campaign is a great way for us to use our skills and build new ones. Volunteering together is a nice way for us to spend time with each other, and gives us any easy person to ask that "stupid" question to when we get stuck with a tax issue. And we always feel great afterwards with many thank you's from appreciative clients."

Thank you Susan and Sandy!



Susan and Sandy on a break in between returns, trusty 4012's at hand!

### \$\$ REFUND REWARDS \$\$

**Clients Save! Volunteers Win!**  
Get a stamp for each client you help enter the Refund Raffle when they save at least \$50 of their tax refund using Form 8888!

*Baltimore*  
**CASH**  
CAMPAIGN





# Thank you & Stay in touch!

[sharon@baltimorecash.org](mailto:sharon@baltimorecash.org)

[www.baltimorecash.org](http://www.baltimorecash.org)

<https://www.facebook.com/BaltCASH/>

<https://twitter.com/baltcash>





# Volunteer Retention

Cuyahoga EITC Coalition

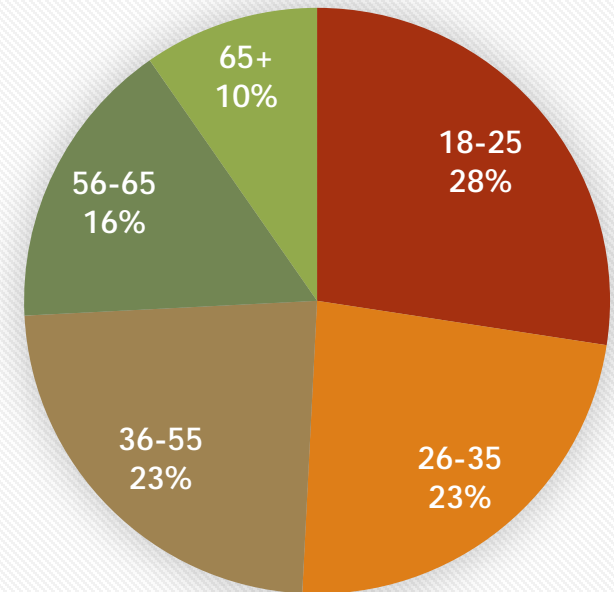
Keely Andrews

[Kandrews@EnterpriseCommunity.org](mailto:Kandrews@EnterpriseCommunity.org)

# Volunteer Recruitment

- College Partners
- Bank Partners
- Business Partners
- Community/Neighborhood Partners
- NPR and College radio ads

## Volunteer Age Groups





# Staff

- ▶ 2014 Staff
  - ▶ Coalition Director
  - ▶ Coalition Program Associate
  - ▶ IT Support
  - ▶ Volunteer Coordinator
- ▶ 2015 Staff
  - ▶ Added a part time Volunteer Relationship Manager




# Pre-tax Season

- ▶ Immediately make personal contact
- ▶ Staff presence at each volunteer training
  - ▶ Onsite tax site volunteer sign up
- ▶ Email Check in
  - ▶ After in person training
  - ▶ During online training
  - ▶ During long gap of becoming certified and being able to volunteer
- ▶ Kickoff event or Orientation
- ▶ Marketing
  - ▶ Neighborhood level newsletters, NPR, religious orgs, businesses, colleges, etc.



# During Tax Season

- Regular Check-ins
- Showing up to tax sites with snacks
- Thank you emails and letters
- Sharing up to date impact
- Make client interaction optional
- Build relationships
- Expand Super Saturday partnerships



# Post tax season

- ▶ More thank you letters, emails, newsletters
- ▶ End of season celebration
  - ▶ Awards for volunteers
- ▶ Keep people engaged
  - ▶ Update/involve volunteers on off season advocacy
  - ▶ Changes coming for the next tax season
  - ▶ Year round tax sites
  - ▶ Summer and Fall gatherings
  - ▶ Social media
  - ▶ Participation on board, volunteer committee, etc.
  - ▶ Connect with current volunteers employers

# Questions?



# Thank You for Joining!

## Stay Connected

- Website: [www.eitcoutreach.org](http://www.eitcoutreach.org)
- Blog: [www.eitcoutreach.org/blog](http://www.eitcoutreach.org/blog)
- Facebook: [www.facebook.com/getitbackcampaign](http://www.facebook.com/getitbackcampaign)
- Tax Credit Outreach News: <http://eepurl.com/bo6ra5>
- Email: [eitcoutreach@cbpp.org](mailto:eitcoutreach@cbpp.org)

