

The logo for 'om•buds•man' features the text in a white sans-serif font on a dark blue rectangular background. The dots in 'om•buds•man' are small green circles.

The National Long-Term Care
Ombudsman Resource Center



VolunteerPro[®]

**National Long-Term Care
Ombudsman Resource Center
Annual Meeting**

**Your Volunteer Offer:
What to Say to Inspire Action**

November 15, 2022

with ... **Tobi Johnson, MA, CVA**



Hey there!

I'm looking forward to connecting with you soon

In this workshop, I will be sharing my TOP insights and frameworks for engaging volunteers to support your local programs and advocacy efforts.

I've been working in marketing and communications for decades and have helped hundreds of volunteer-driven organizations improve their results. My goal is to help you build the momentum you need to reach your biggest recruitment goals.

Can't wait to see you there!

Tobi Johnson
President & Founder
Tobi Johnson & Associates | VolunteerPro
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TO GET THE MOST FROM THIS PRESENTATION, HERE ARE THREE HELPFUL SUGGESTIONS ...

☐ REFERENCE THIS WORKBOOK

Use it during our time together to stay fully engaged and take notes on the actions you want to implement quickly. I've specifically given you just a few discussion points throughout this workbook that you can use throughout each session and to prompt your planning when you return back to your office.

☐ JOT DOWN YOUR QUESTIONS & IDEAS

At the end of my presentation, we'll have a few moments for Q&A. Think of your question in advance and write it down so that you will be sure to ask it.

☐ GET READY TO PARTICIPATE

I believe that the best learning involves action. This will be a truly interactive session, so get ready to participate fully. Your collective wisdom is mighty, so get ready to share your ideas with others!



Make the Most of **THIS MOMENT**

There have been major shifts in society and volunteerism over the past two years. However, these shifts are not without their opportunities to connect with people who want meaningful, nurturing experiences in their lives.

In order to take advantage of the opportunities the current environment offers we must open our minds and be willing to evolve.

In today's world, leaders who excel are relentlessly asking – how can I make things easier for my team in this environment?

Ask Yourself ...

- How can you make volunteering **EASIER** not **HARDER**?
- What are long-held assumptions about your organization, your capabilities, and how you engage volunteers that may need to be examined? What new technologies and tactics might be needed? What leaps of faith might you need to take?

THREE CORE HUMAN NEEDS ...

According to psychologist and mindfulness expert Rick Hanson, “Every human being has three basic needs—safety, satisfaction, and connection—that are grounded in our ancient evolutionary history. While our circumstances have changed enormously over the last 200,000 years, our brains have remained largely the same. The neural machinery that enabled our ancestors to satisfy their need for safety by finding shelter, for satisfaction by getting food, and for connection by bonding with others is alive in our brains today.”

Volunteers, too, are driven by these three core human needs.

Safety	Satisfaction	Connection
<ul style="list-style-type: none"> • Avoiding Harm • Emotional • Physical 	<ul style="list-style-type: none"> • Approaching Rewards • Purpose • Progress 	<ul style="list-style-type: none"> • Attaching to Others • Belonging • Friendship

What can you do to boost activist safety, satisfaction, and connection?

- Safety
- Satisfaction
- Connection

How can you involve volunteers in the process?

For more, see: Rick Hanson, Ph.D., “The Lizard, the Mouse, and the Monkey” - https://www.rickhanson.net/wp-content/uploads/2014/11/7_LizardMouseMonkey_MultiPage.pdf

AN ALTERNATE VOLUNTEER EXPERIENCE ...

The current environment brings up anxiety for many people. But organizations can offer an alternative to anxiety and chaos for their supporters.

They can purposefully design an environment that offers refuge, a place with a sense of fair play, and place where volunteers can control their destiny.

How can you offer the following to current and future volunteer leaders?

- Clarity
- Connection
- Equity
- Respite

How can you make volunteering easier not harder?

IDEAS AND INSIGHTS ...



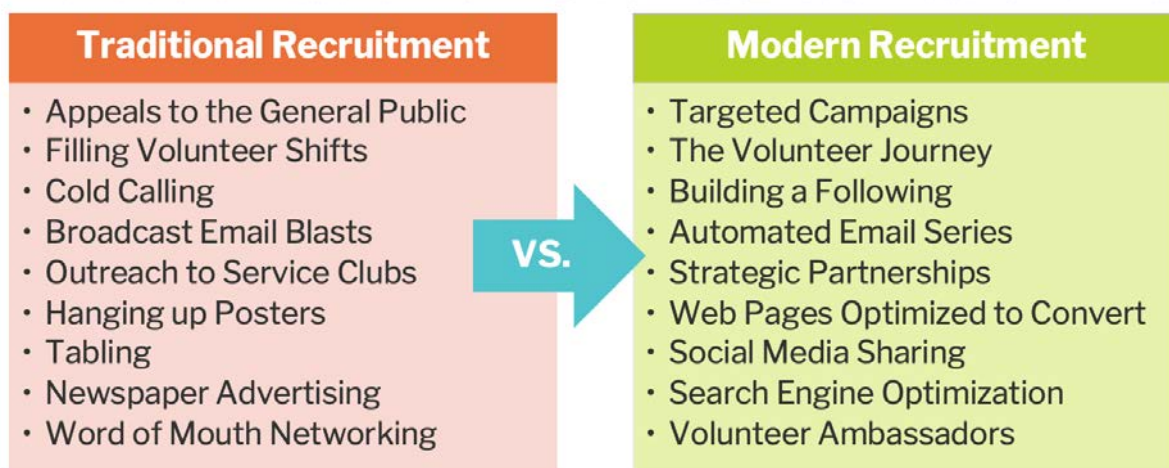
Step-by-Step **MESSAGING FORMULAS**

There are big differences between what's working in marketing now and what worked in the past. Through personal computers and small handheld devices, the entire world has changed how it gets information.

In addition, the speed and diversity of information has exploded. So, volunteer recruiters have a lot to compete with in terms of information. It's a noisy world out there.

The good news is that communications tools are more affordable than ever and with the right message, you can break through. A thoughtful content strategy can help you build trust and propel volunteers up the ladder of engagement.

During this two-part workshop, we'll show you how!



RECRUITMENT CAMPAIGN FRAMEWORK ...

Successful marketing, and volunteer engagement, involves listening as well as speaking. So, make sure you've done your homework and understand your needs as well as the needs of prospective volunteers.

A smart volunteer engagement plan includes more planning than doing, in order to pinpoint concrete goals, create a picture of your ideal volunteer, creating messaging that is more likely to attract them, and reaching them through the places and people they trust to inspire action.

The good news is that once you've done this preliminary work, you can use these strategic thinking and messaging repeatedly, each time you are ready to recruit your next team members.

Successful Volunteer Recruitment in Five Steps



TRADITIONAL RECRUITMENT FORMULA

Marketing Personas are fictional, generalized representations of your ideal customers, in this case volunteers. Having a deep understanding of your Persona(s) is critical to designing recruitment messages that resonate, choosing the right messengers, and using the right channels to share your appeals.

Here's a simple formula you can use for your next appeal. Create one appeal for each position you are seeking. Brainstorm your ideas for each section below.

- **What's the Problem?** – The community problem or volunteer challenge you are addressing this this role

- **What's the Solution?** – The organization's intervention for solving the problem that requires volunteer support

- **What's Involved?** – The schedule, training, support, etc. that are required

- **What Do You Need Me to Do?** – A call to action with specifics about next steps

IDEAS AND INSIGHTS ...

YOUR TRUE PURPOSE (BIG WHY) ...

While a traditional volunteer recruitment appeal can work, marketing is most effective when it elevates your audience and what you are trying to accomplish. This means clearly communicating your higher purpose – or BIG WHY – in a compelling way.

Use the following framework to arrive at your team's BIG WHY ...

- **We [activity] ...**
- **Which produces [output – the “what”] ...**
- **We do this so that [immediate outcome] ...**
- **So that [intermediate outcome] ...**
- **So that [intermediate outcome] ...**
- **So that [intermediate outcome] ...**
- **So that [intermediate outcome] ...**
- **So that [ultimate outcome – the “why”] ...**

PITCHING FROM THE INSIDE OUT...

When we think about creating a volunteer posting or call-to-action, we rarely infuse emotion into it. That's a big mistake.

Highly successful leaders communicate from the inside out. Our gut decides, intellect justifies. Decision-making comes from your limbic (emotional) brain.

Here's how to develop a compelling "pitch" from the inside out. Author Simon Sinek calls this the "Golden Circle." We follow people, organizations, and businesses who believe they same things we believe, not for them, but for ourselves.

Here's how to develop a compelling "pitch" from the inside out.

Formula:

- **WHY** (what we believe – Our True Purpose)
- **HOW** (we embody what we believe)
- **WHAT** (what we are offering)
- **HOW MUCH** (what we've achieved)
- **BONUS:** Here's what they had to say about their experience [insert testimonial].

For Example:

- **WHY:** We believe that everyone has the right to age in place with dignity, and the community is a powerful partner in this mission.
- **HOW:** Neighborhood volunteers help [insert specific role] with compassion and care to people in need.
- **WHAT:** You are invited to help protect & support seniors in our community by [insert call to action].
- **HOW MUCH:** Last year, [XXX volunteers] [insert key results].

For more, check out Simon Sinek, "How Great Leaders Inspire Action," - https://www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action

WORKING THROUGH OBJECTIONS ...

Use the 5 Objections Exercise below to better understand the barriers your volunteers face. You will have already begun this work as you developed your ideal volunteer Persona(s).

These are helpful to think through before you begin your recruitment, so that you can validate whether these are the true objections for your target audience. Plus, you'll be better prepared to answer them when they come up.

5 Objections Exercise

Ask yourself: What circumstances or thoughts might prevent my ideal volunteer from engaging right now? Jot down five key objections below.

- 1.
- 2.
- 3.
- 4.
- 5.

Notes For Managing Volunteer Objections to an Invitation to Service:

- Make sure you really understand what the objection is – People are famously indirect. If you have the chance, ask for details. Ask things like “What is your biggest concern?” or “Can you explain what worries you?”
- Pinpoint what’s in the way – You may understand what worries them, but still not understand the barrier. Ask things like “What are the primary factors in your decision?” or “What would need to change for you to join us?”
- Validate their concerns – People often have valid fears and reasons why they hesitate to commit. Repeat back what you heard them say to let them know you’re listening. Do this before you respond to their objections with alternatives or point out any benefits they may have overlooked.

THE PERFECT FOR YOU METHOD ...

Use your objections to create high contrast messaging to help your ideal volunteers make some decisions.

You can do this by using a "challenge style" list. Create two contrasting bulleted lists that cover the key qualifications, mindsets, and aspirations of the ideal volunteer for your cause. It will help them proactively assess their own suitability for a role and identify with your organization more deeply, if they believe it's a good fit.

Challenge-Style Checklist Formula

- **Volunteering IS for You If ...**

-
-
-
-
-

- **Volunteering IS NOT for You If ...**

-
-
-
-

FUTURE PACING ...

Use future pacing in your talking points to help your audience envision what's possible or what's ahead of them.

Three Steps to Future Pace

- 1) Acknowledge where they're at right now – "At this moment, you may doubt your ability to make an impact."
- 2) Future pace – "But, imagine if ..."
- 3) Celebrate what would change – "That would be amazing, wouldn't it?"

MESSAGE THAT INSPIRE ACTION ...

Develop key messages that will appeal to your volunteer Persona and communicate your BIG WHY.

Once you have these written, you can re-purpose them for use anywhere – your newsletter, social media posts, your website, emails, etc.

For the Flip Chart: Create a list of key messages that will resonate with your ideal volunteer Persona.

Use the prompts below to guide your discussion ...

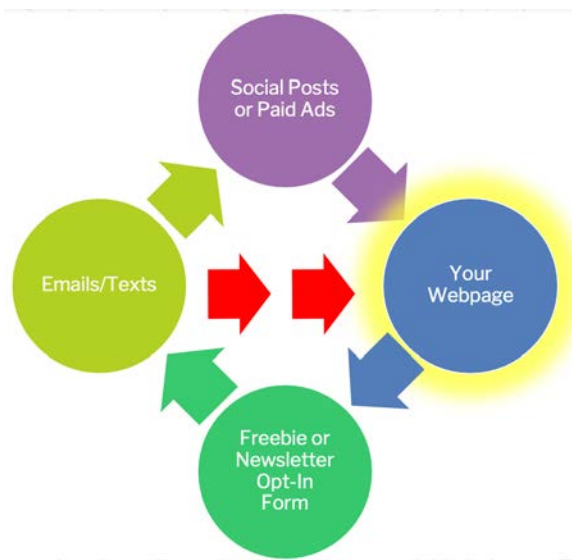
- **What is Possible? Paint a Renewed Vision of Hope**
 - Think broadly - What are the current challenges for your membership and volunteers?
 - What is a bright new future that you envision for your community?
 - What is the better world that will come about because of volunteer support?
- **What Transformation Will Volunteer Members Bring About? Explain Why Volunteers Matter**
 - What will you achieve that you could not achieve without their help?
 - Why transformation will occur (project goals, renewed activities, quality of life for members/patients/customers/clients)?
- **Who are the best people to share these messages with your Personas?**



Where to **SHARE MESSAGES**

You have six key recruitment channels that can help you share your messages and connect with supporters. Think of your volunteer recruitment as an ecosystem that is also influenced by other communications within your organization. The goal is to deepen engagement of ALL of your stakeholders over time.

And all communications should be driving interest to a central volunteer recruitment webpage where you can share more information and educate the public about your opportunities. This serves as your recruitment hub.



IDEAS AND INSIGHTS ...

6 WAYS TO REACH POTENTIAL VOLUNTEERS...

There are six key ways to recruit volunteers, prioritized with the most effective at the top. You don't have to use them all. However, using more than one will increase your success.

Think of your volunteer and member communications as an eco-system that is also influenced by other communications that exist throughout your organization. The goal is to drive followers to your web pages for more information and to deepen engagement of ALL of your stakeholders with baby steps. That way, when you are ready to ask for help, they will be ready to step up.

Six Channels to Choose From

- 1. Your Website**– Place calls-to-action alongside other content on your website and create volunteer engagement pages (with the community need, what the solution and project, details on team responsibilities, time commitment, testimonials, specific steps to join, etc.)
- 2. Email & Text Campaigns** – broadcast newsletter and e-blasts, automated email series (for recruitment, onboarding, training, appreciation, etc.)
- 3. Social Media & Chat Apps** – a mix of social content (promotions & calls to action, inspirational stories, informative content)
- 4. Live Events** – trainings, luncheons, fundraising events, community fairs, other special events (e.g., volunteer info sessions)
- 5. Personal Asks & Word of Mouth** – online (e.g., via LinkedIn) & in-person; making direct asks and asking partners to help spread the word
- 6. Paid & Earned Media (when it makes sense)** – paid advertising and public service announcements in your industry's press (including inside your own organization's publications) can be helpful in raising awareness about member benefits, including volunteerism and leadership opportunities

Which of the methods above have you used with success (that you should double down on) and which would you like to try (to test and adjust)?

BUILDING A VOLUNTEER PERSONA ...

Marketing Personas are fictional, generalized representations of your ideal customers, in this case volunteers. Having a deep understanding of your Persona(s) is critical to designing recruitment messages that resonate, choosing the right messengers, and using the right channels to share your appeals.

Personas help us internalize the ideal volunteer we're trying to attract and relate to our them as real humans. They are an imaginary “archetype,” NOT a stereotype, that stands in for those you are trying to reach

- To help you focus beyond the “general public”
- To break down your audience into segments
- To help you find and communicate more effectively with your prospects
- To deliver experiences that meet their needs

Your Personas can also help you develop appreciation and retention strategies that make sense for this particular audience segment.

IDEAS AND INSIGHTS ...

BUILDING A VOLUNTEER PERSONA ...

Below are some details you'll want to brainstorm as you imagine your ideal volunteer persona.

For the Flip Chart: Build out a Persona that stands in for your ideal volunteer.

- **Name**
 - Details about their job/role
- **Goals & Motivations**
 - Why volunteering makes sense in their world
 - What they want to achieve
 - How you help achieve their goals
- **Quote**
 - How they would describe themselves
 - What they have a strong opinion about
- **Values & Interests**
 - What they are committed to
 - What do they believe
 - How you align with that value
 - What are their hobbies
- **Common Objections & Fears**
 - What stops them from serving
 - What they are the afraid of
 - How you help them overcome their barriers
- **Sources of Information**
 - Who they trust
 - Who they look up to
 - What they read
 - Where they hang out online
- **Keywords**
 - What words they use to search for volunteer opportunities
- **Timing**
 - When they are most likely to be open to an ask

VOLUNTEER CONTENT ON PURPOSE ...

Commitment is a process, not a destination. So, we should think about communications with volunteers is a way to build commitment through a transformational journey.

Your goal is to directly address the worries, limiting, beliefs, and mindset blocks that aren't serving your ideal volunteer and keep them from taking action. Without understanding and directly addressing any doubts or confusion, volunteers are not likely to act. So, the first step is to understand what thoughts might be "speed bumps" in their journey.

As you build this transformative journey, consider what types of content might be helpful to addressing any limiting beliefs that hold volunteers back – Myth Busters, Mindset Shifters, and Confidence Boosters.

- Mis-understandings about your cause
- Mis-perceptions about volunteering
- Mis-information that impacts what you do
- **Examples?**

**Myth
Buster**

1

- Calling out limiting beliefs
- Widening or narrowing the lens
- Future pacing (AKA "what ifs?")
- **Examples?**

**Mindset
Shifter**


2

- Instilling new beliefs about capabilities
- Reassurances about available support
- Hero's journey stories
- **Examples?**

**Confidence
Booster**

3

IDEAS AND INSIGHTS ...



*Create like an artist.
Solve like an engineer.
Act like an entrepreneur.*

FREE RESOURCES

VOLUNTEER NATION PODCAST

Check out these pod episodes for a deeper dive on volunteer recruitment strategies. You can find them on your favorite podcast app or on our website using the links below.

- **Episode #002: How to Recruit Volunteers by Building a Following First** - <https://tobjohnson.com/002-recruit-volunteers-build-following-first/>
- **Episode #005: 8 Ways Your Nonprofit Website is Failing to Attract Volunteers** - <https://tobjohnson.com/005-nonprofit-website-attract-volunteers/>
- **Episode #020: How to Design Irresistible Online Volunteer Opportunities** - <https://tobjohnson.com/020-design-irresistible-online-volunteer-opportunities/>
- **Episode #021: Engage Volunteers with a Win-Back Campaign** - <https://tobjohnson.com/021-engage-volunteers-with-win-back-campaign/>

2023 VOLUNTEER MANAGEMENT PROGRESS REPORT SURVEY

Now in its eighth year, we hope to share current trends for professionals who lead, manage, and coordinate volunteers and how volunteer-involving organizations do business in today's world. Don't miss your chance to participate in this global "state-of-the-industry" survey and hear the results early!

<https://volpro.net/volunteer-management-progress-report/>



What lingering questions do you have about engaging volunteers?

QUESTIONS FOR THE Q&A ...

KEY TAKEAWAYS ...

Based on what you learned today, what are your next steps?

**You didn't come this far, only to come this far.
Learn more at - www.volpro.net**