



Advanced Volunteer Management

Wharton Club Leadership Week 2022

Kelly Lauersen, Senior Associate Director, Global Clubs

Volunteer management is hard...



The daydreams of cat herders

But so important!

79 clubs

**1,000+
events**

**800+
volunteers**

**30,000+
hours
donated
this year**

Volunteer Motivations

- Motivations change over time
- Match opportunities to motivations
- Cost-benefit analysis
 - “Enlightened self-interest”

Volunteer Functions Inventory

1. Values

2. Career

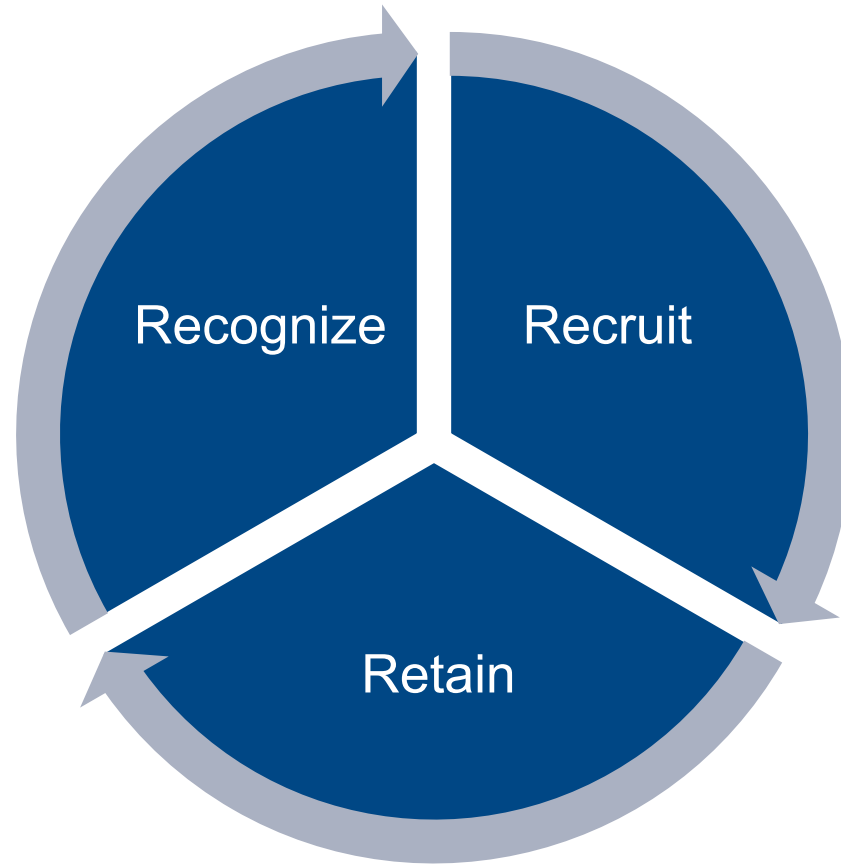
3. Social

4. Understanding

5. Enhancement

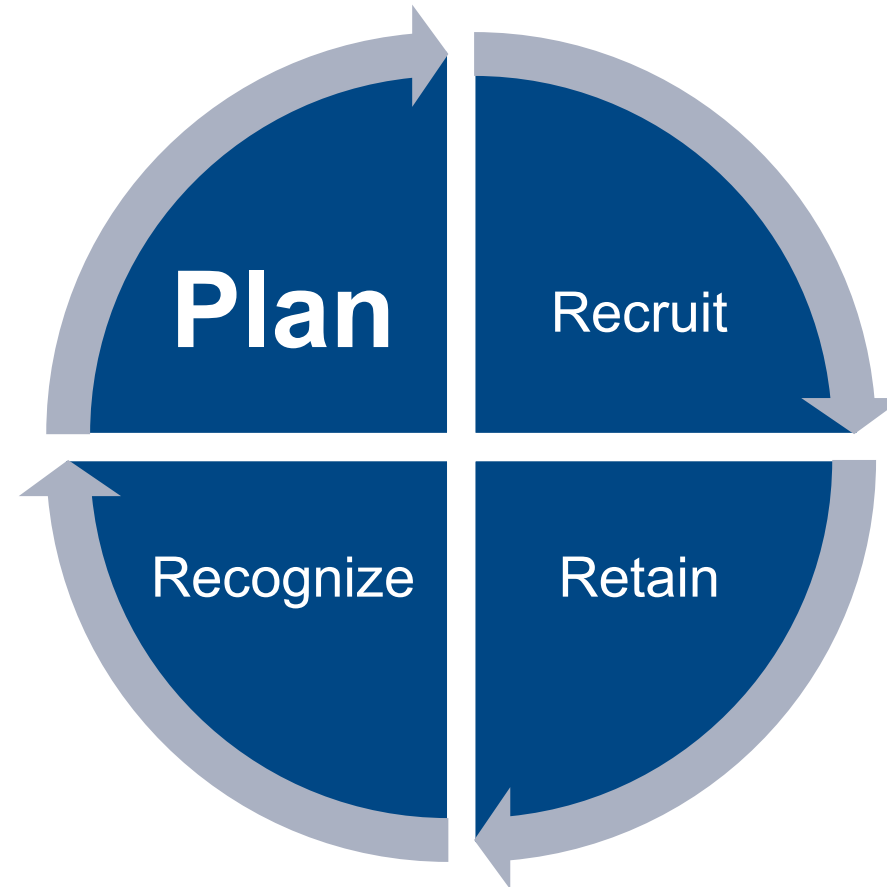
6. Protective

Lifecycle of a Volunteer – The 3 R's



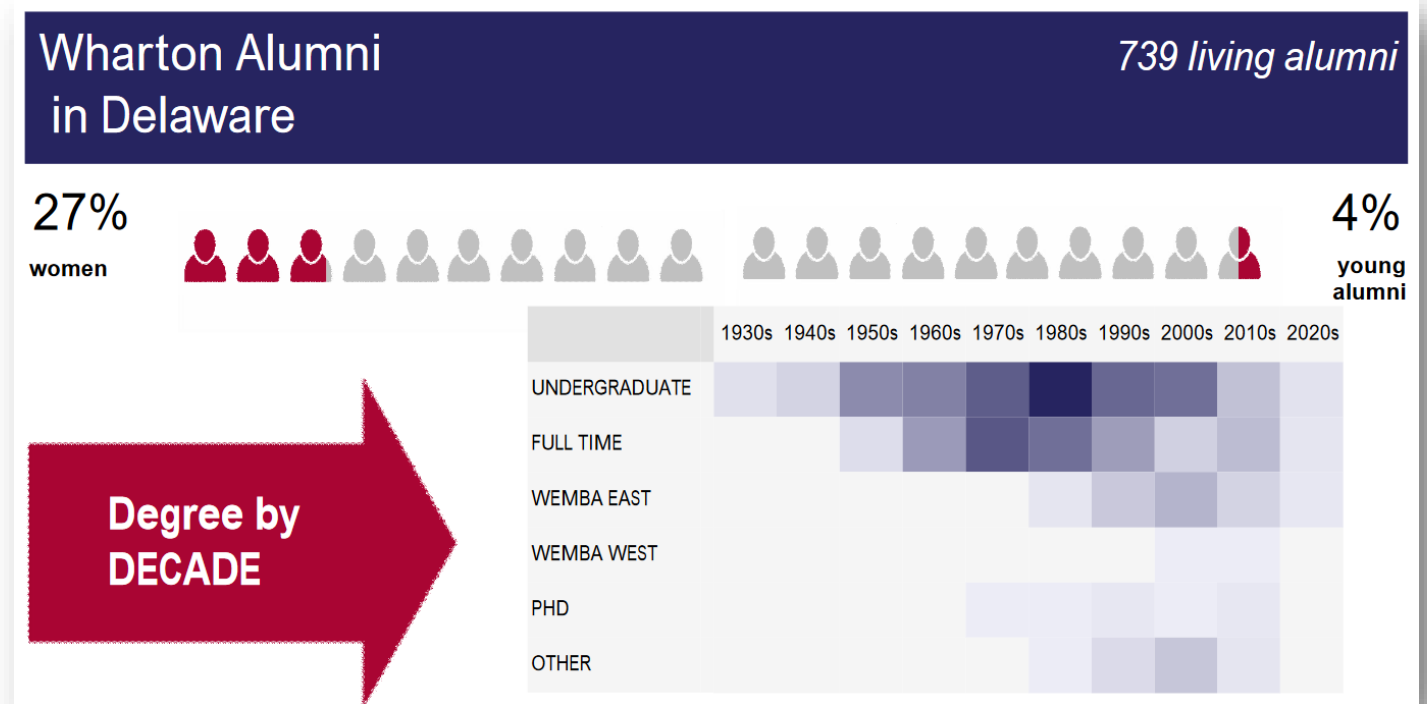
Lifecycle of a Volunteer

The most important step is planning!



Phase 1: Plan

- What do your bylaws say?
- What do you do when someone raises their hand to help?
- Perform a needs assessment
- Leadership team should reflect your alumni population
- Importance of diversity



Leadership Team Structure

- Role of the president
- Leadership team size
- Assign roles and responsibilities
 - Position descriptions
 - Set team and individual goals
 - Be specific about time commitments
- Committees
- Episodic volunteering



Position Descriptions

President

- Leads the club in its engagement, programming, and services for alumni in the region or affinity
- Maintains responsibility for the overall operation, organization, and supervision of the club, including fiscal responsibility, the appointment/management of other officers, and succession planning
- Usually acts as the primary contact with the staff liaison and the Wharton School
- Time commitment: XX hours/month

Treasurer

- Maintains and supervises club bank account, pays all club bills, and records sources of income
- Prepares and submits financial statements to the officers and members
- Files all required tax documents
- Time commitment: XX hours/month

VP of Membership

- Creates a strategy for membership including a plan to recruit and retain new members
- Welcomes and recognizes new members during events
- Gathers feedback from existing and new members to improve programming
- Time commitment: XX hours/month

Webmaster

- Serves as the official point of contact for all matters related to the club website
- Updates and maintains (or manages an administrator to update and maintain) all website content
- Manages email communications and online event registration, including initial troubleshooting
- Time commitment: XX hours/month

VP of Young Alumni Programming

- Plans and executes programming and events that appeal to recent graduates (0-10 years out)
- Represents the interests of young alumni on the club board
- Collaborates with VP of Communications or Webmaster to develop a communications strategy to target young alumni
- Helps coordinate events for summer interns
- Manages young alumni committee
- Time commitment: XX hours/month

President Emeritus

- Serves as a mentor for the current President during his/her term
- Provides historical knowledge and context when appropriate
- Helps maintain club succession plan
- Participates in leadership meetings
- Time commitment: XX hours/month

<https://www.whartonofficers.com/leadership>

Phase 2: Recruit

- Always be recruiting!
 - Make it visible
 - Best way to recruit new volunteers is to thank your current volunteers
- Volunteer info sessions
- Call for volunteers events
- Surveys
- Elections
- Just ask!



Phase 3: Retain

- Volunteer training/onboarding
 - Set expectations
 - Introduce to your staff liaison
 - Resources available
 - Team culture
 - Historical knowledge
- Accountability
- Team dynamics
 - Communication
 - Board meetings
 - Have fun!
- Firing a volunteer



Phase 4: Recognize

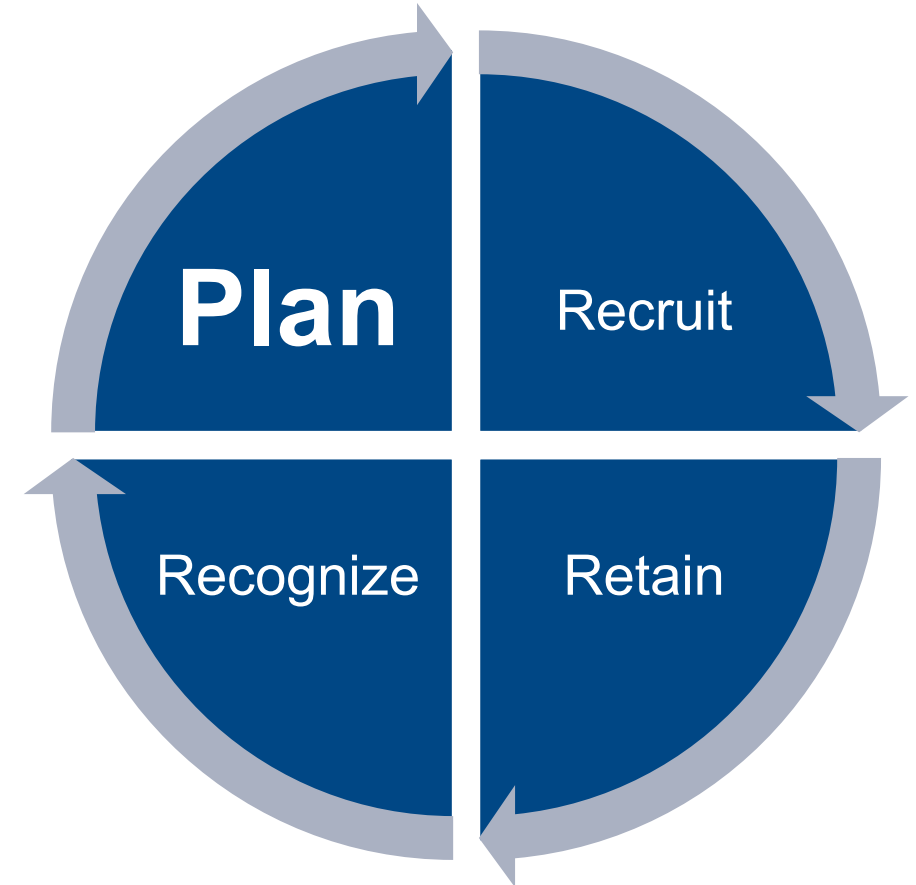
- Celebrate
 - Remember important dates
 - Highlight milestones and project completions
 - Share results and outcomes
 - Host events that are volunteer focused
- Create meaning
 - Connect back to mission of club or School
 - Professional development
- Thank
 - Follow-up!
 - Special access to events and speakers
 - Make it visible



https://www.whartonofficers.com/stewardship_guide

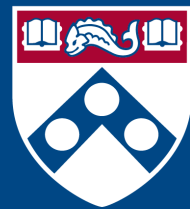
Succession Planning

- The most important job of a president is finding a successor
- Term limits
- Off-boarding process
 - Bank accounts
 - Passwords
- Elections
- Staggered transitions
- Advisory boards



THANK YOU!





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