



**EVENT
LEADERSHIP
INSTITUTE**

Planning expertise . . .

On demand

Recruiting and Managing Event Volunteers

An Event Leadership Institute White Paper
By Howard Givner

Table of Contents

Acknowledgment.....	3
About the Event Leadership Institute.....	3
Introduction.....	5
Benefits of Utilizing Volunteers	6
Unpaid Labor	6
Passion, Enthusiasm	6
Community Building	6
Challenges of Utilizing Volunteers.....	7
Recruitment Challenges: Time and Money	7
Management Challenges: Losing the Threat of Firing	8
Fulfillment Challenges: Potential No-Shows & Walking Off the Job.....	8
Recruiting	9
Legal / Insurance Issues.....	9
Why People Volunteer & How That Should Influence Your Thinking.....	9
Managing Expectations	11
Dealing with No-Shows & Walk-Offs	12
Motivating Your Volunteers	15
Make A Difference.....	15
Be Part of A Community	15
Enhance/Maintain A Reputation	15
The Strategic View of Volunteers	16
Learning From Street Teams.....	16
The Volunteer As Brand Ambassador.....	17
Fostering Customer Loyalty	18
Training.....	19
Soft Skills and Big Picture.....	19
Details	20
Format	21
Managing Your Volunteers	22
Where, and Where NOT, to Place Volunteers	22
Manage Volunteers Like You're Running A Business.....	24
Thank Them	25
Post-Event Tasks.....	26

ACKNOWLEDGMENT

At the Event Leadership Institute, we place a great premium on the quality of our content. Whether it's a video class, interview with an industry leader, webinar, live event or white paper, we believe that what sets us apart is our intense focus on having strong content.

Producing good content takes time and costs money, and accordingly we believe people should pay for it. We also feel that by charging users for our content, it keeps us accountable, as all of our content is backed by a money back guarantee. When people pay for content, they have higher expectations than if it's given away free, and we welcome those expectations.

When Eventbrite heard we were producing this white paper, they asked if they could sponsor it, in order to make it available for free to anyone who wanted insight into utilizing and managing volunteers for their events. We applaud Eventbrite's efforts to make this content and insight more broadly available within the events industry, and thank them for their support of our mission to empower planners to create, plan and execute smarter, more cost-effective events.

ABOUT THE EVENT LEADERSHIP INSTITUTE

The Event Leadership Institute is the nexus for the most progressive training, education and insights for the event planning industry. Our mission is help planners create, plan and execute smarter, more cost-effective events and grow their businesses. We accomplish this by cultivating and sharing best practices through video classes, webinars, interviews, white papers, roundtables, and live events. For more information about our offerings, please go to www.EventLeadershipInstitute.com.

The Event Planner's Best Friend

EventbriteTM

Online Registration

—... & ...—

Integrated Social Sharing



Official pal of ELI

eventbrite.com

INTRODUCTION

Volunteers serve a wide range of functions at many events: greeters, wranglers for speakers and other VIPs, gift bag stuffers, human signage directing crowd flow, room monitors for conferences, check-in staff and other key jobs. They run errands, trouble-shoot, and otherwise assist planners in a variety of tasks. In fact, for many events, they provide the backbone of support in executing the logistics of the program.

Given how much events rely on volunteers, it can be surprising to learn how little effort is often made in properly sourcing, vetting, and training them. One general goal of this white paper is to provide a spectrum of best practices for recruiting, motivating, training and managing event volunteers to help insure they are properly utilized in service of the event.

Invariably, event volunteers also wind up providing customer service by answering attendee questions and helping direct them to their destinations. As such they often constitute the front lines in representing an organization's brand to their customers at the event. A large portion of event organizers not only ignore addressing this area, they often don't even recognize it as a need at all. Therefore, the second general goal of this white paper is to offer insight and guidance into how to view volunteers from this broader strategic perspective, and how to help cultivate them as true brand ambassadors.

BENEFITS OF UTILIZING VOLUNTEERS

UNPAID LABOR

Far and away the number one reason planners utilize volunteers is that they are, well, volunteers, meaning they work without pay. For events that deploy large teams of staff in the execution of event elements, this cost savings can add up considerably.

CAVEAT: Be sure you *look at the full financial picture* before making a decision to go with event volunteers. Though the cost savings in labor can be significant, it's usually not the only element in the economic ledger to consider. (see below for more detail).

PASSION, ENTHUSIASM

Volunteers participate in events because they are passionate about its cause, subject matter, headlining acts, etc. Whether you're staffing a political rally, a music festival, or a charity fundraiser, the volunteers are there because they care about what you're doing. It's hard to get that same level of passion and drive in paid workers. With relatively little effort, you can rally event volunteers into excited evangelists who can not only perform the desired task at the event, but who will also gladly spread the word for your cause, both at the event and before and after as well.

COMMUNITY BUILDING

Volunteers often form the backbone of a community of like-minded individuals gathered around your cause or event. Unlike a hired gun worker, volunteers will have a spiritual allegiance to your mission, and they enjoy connecting with other like-minded individuals.

CHALLENGES OF UTILIZING VOLUNTEERS

RECRUITMENT CHALLENGES: TIME AND MONEY

Finding, interviewing and evaluating volunteers takes time, and by extension costs money, because this task is most often overseen by paid internal staff. It takes considerably more time to source volunteers than it does to find paid staff, and that time and money needs to be accounted for.

Let's say you needed to find ten volunteers for a five hour event. If you were to hire those ten people from a staffing company instead, perhaps you'd pay \$20 an hour. That's \$100 per person, or \$1,000 total for the staff, but virtually zero time for your internal worker to fill the order. All they had to do was call the staffing agency.

If, on the other hand, that internal worker had to oversee the process of securing those ten positions as volunteers, it might take five to ten hours of his time, between calling local colleges and community organizations to get the word out, posting the job on social media platforms, scheduling interviews with them, even if over the phone, and conducting the interviews.



To get ten qualified volunteers to show up at the event, he needs to line up fifteen of them (assuming a 1/3 drop out rate). To secure fifteen volunteers he maybe has to interview and evaluate twenty to thirty people, as not all will be the right fit.

By contrast, when using a staffing agency part of the service you get is that they interview and vet the candidates, saving you that time.

So now the question is what is that five to ten hours of your internal worker's time worth to your organization? If in that time he could instead have solicited paid sponsorships for the event, and maybe brought in one for \$5,000, that's a five fold increase over the \$1,000 he would have saved in labor costs by using volunteers.

I'm not saying it's more cost effective to use a staffing agency than to recruit volunteers. What I am saying is that **TOO OFTEN ORGANIZATIONS FOCUS ON THE SAVINGS THEY GET FROM "FREE STUFF", AND DON'T ALSO FACTOR IN THE TIME AND OPPORTUNITY COSTS ASSOCIATED WITH PROCURING THAT FREE STUFF.** The key takeaway is that your

organization has to do the math and think through the exercise before blindly embarking on a course of action in utilizing volunteers.

MANAGEMENT CHALLENGES: LOSING THE THREAT OF FIRING

The biggest challenge with managing volunteers is that the threat of being fired, normally the greatest cudgel an employer has, carries little motivational weight to the volunteer. After all, they're not getting paid anyway, goes the thinking, so what are you going to do, not pay them more?

While that is largely true, the greater impact to event hosts is that the volunteer managers themselves are often more paralyzed by that concept than the volunteers themselves. In other words, the supervisor is afraid to discipline, or offer constructive criticism to, a volunteer because they don't think they're entitled to do so to an unpaid worker.

The truth is, volunteers, by definition, are NOT motivated by money when they sign up to volunteer at an event, and once they sign up, they usually want to do a good job and get recognized for their work. As such, supervisors are really doing the volunteers a disservice by not providing the same best practices of worker management to them. Volunteers don't want the stigma of being fired from a job, and yes, you can fire them.

FULFILLMENT CHALLENGES: POTENTIAL NO-SHOWS & WALKING OFF THE JOB

Another risk in relying on volunteers is that there is always a risk they will either not show, or leave before their agreed shift time is completed. Though this risk applies to paid workers as well, it occurs far less. If paid workers don't show up, they don't get paid. If they leave before they're supposed to, they won't get paid their full amount, and won't be hired again. Any organization that deploys volunteers should always prepare for the possibility of no-shows and early departures, and have contingency plans in place for responding.

RECRUITING

LEGAL / INSURANCE ISSUES

Before embarking on the process of securing volunteers for your event, be sure to check with both your insurance agent and your attorney. Your insurance agent will advise you if your coverage extends to the volunteer worker, while the attorney will guide you on how to protect the interests of your organization from various forms of liability associated with volunteers, and event staff in general.

WHY PEOPLE VOLUNTEER & HOW THAT SHOULD INFLUENCE YOUR THINKING

The question of why people volunteer may seem either obvious (*they care about what we're doing*) or irrelevant (*who cares as long as they show up and do the work*). But understanding why someone volunteers can be a key to knowing where to find them, how to motivate them, and insuring that both you and the volunteer get the most out of the experience.

SUPPORT A CAUSE

Perhaps the most common reason people volunteer is because they care about what you're doing. If that's the case, be sure to tap into that vein of passion and give them the tools and direction to run with it. It doesn't take much to turn an interested volunteer into an enthused evangelist.

GAIN EVENT PLANNING EXPERIENCE

Many aspiring meeting and event planners looking to enter, or grow within, the events industry, are eager to volunteer specifically to work at events, opening you up to a whole crop of volunteer labor for whom the art of event management is taken very seriously.

TRADE SOURCES

Consider placing ads and notices in local event industry publications, such as www.BizBash.com, with local event and meeting industry associations, such as:

- International Special Events Society, www.ises.com,
- Meeting Professionals International, www.mpiweb.org,
- Professional Convention Management Association, www.pcma.org,
- American Society of Association Executives, www.asaecenter.org,

- Association of Fundraising Professionals, www.afpnet.org

HOSPITALITY SCHOOLS

Many hospitality schools require their students to perform a certain number of hours of internship / work experience and can be a source of highly motivated volunteers. Ask for the career services department, or the instructors of specific event management courses, to help get the word out.

A number of the associations listed above can be a resource in listing hospitality schools. Here's one example:

<http://www.ises.com/ProfessionalDevelopment/UniversityList/tabid/89/Default.aspx>

Make sure they do gain some experience, and are explained how their task interacts with the broader event. Invite them to participate in walk-through's, rehearsals, and other activities to see how they're done. Unlike most other volunteers, these people want to learn how event planning works, so make an effort to give them a window into your coordination process.



GAIN INDUSTRY-SPECIFIC EXPERIENCE

Many events provide great opportunities for people to get experience within a particular industry or at a certain craft, and there are lots of people willing to forego getting paid in exchange for the chance to build their resume and make connections. For example, if you're producing a music festival, consider reaching out to music schools, or the music departments at local colleges and universities.

If someone is volunteering at your event in order to gain experience, it's important to be very clear up front what is expected of them, and exactly what experience they'll get, and what they won't get. Then it's critical to deliver on what's been promised.

SHARE EXPERIENCE

On the flip side, a number of experienced workers are looking for an opportunity to give back to their industry, community or cause, and want to do so in a volunteer capacity. It may seem counterintuitive to reach out to a senior person within your field to not only ask them to teach others how to do something, but to ask them to do it for free, but under the right circumstances that can be compelling to certain people.

As is the case with someone volunteering in order to gain experience, if someone volunteers to share their expertise, it's critical that they're put in a position to do so, and not parked only where the event needs them the most.

FULFILL COMMUNITY SERVICE REQUIREMENTS

A number of schools, companies, and community groups require their constituents to perform a certain number of hours of community service. If this is where you're getting your volunteers, you'll need to be sure to have a system for tracking and reporting the hours they worked.

MANAGING EXPECTATIONS

Unfortunately, event volunteers get taken advantage of. Event organizers often assume that if someone shows up to volunteer at an event they can pretty much deploy them to any job they see fit, and keep them there as long as they need. This is a recipe for disaster, and at the very least unhappy volunteers who will not return.

BE SPECIFIC ABOUT TIME COMMITMENTS

Let volunteers know exactly how long they'll be working, and stick to those times. Don't extend those hours without giving a reason and getting their buy in.

BE SPECIFIC ABOUT THE JOB(S) THEY'LL BE DOING

Event volunteers sometimes assume they'll be doing more glamorous jobs than they will, or that even exist for that matter. Like being personal envoy to Brad Pitt or Madonna when they arrive at a fundraiser, or wearing a walkie talkie headset and having something mission critical to say into it. The reality is rarely glamorous: stuffing gift bags, packing up boxes of literature after the event, taping up signs, directing pedestrian traffic by repeating the same hand signals five hundred times in a row.

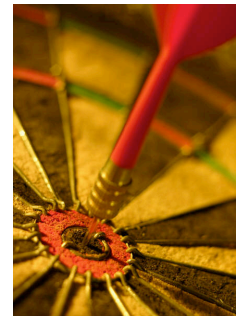
Liz Glover Wilson, President of Elizabeth Rose Consulting, which only consults on fundraising events, says it's absolutely critical to focus on the importance of ALL jobs as key to the event's success. *"We have a very high rate of volunteer satisfaction, which I believe has a lot to do with setting the right expectations PRIOR to the experience. We focus on how all parts contribute to the greater output, and that no job is more or less important than another, and we truly believe that."*

ONLINE SCHEDULING & INFORMATION

One way to avoid miscommunication about time commitments and job responsibilities is to consider utilizing an online volunteer management system, such as www.Shiftboard.com, or www.Volunteer2.com. Compared to Excel, these systems update in real time, and start to make a lot of sense for events utilizing larger numbers of volunteers. With many systems the event organizer inputs the various jobs needing staffing, along with descriptions and time slots, as well as how many of each position are needed. Assuming your volunteers have already been vetted, they can then sign up for the positions they're interested in. Advanced systems will update information dynamically, so if you need ten check in staff and someone signs up, that number then drops automatically to nine, etc.

LET VOLUNTEERS PICK THEIR OWN JOBS & SHIFTS

You don't need a sophisticated scheduling system to allow volunteers to select their own jobs and shifts; that can be done in the most rudimentary ways. The benefit is that the volunteer feels a sense of empowerment over how they will allocate the time they donate, and they're much less likely to bristle or complain on the job if the task is less pleasant than they thought, or their supervisor is not as nice as they'd like.



DEALING WITH NO-SHOWS & WALK-OFFS

NO-SHOWS

PART OF THE GAME

If you ask five friends to help you move, expect three to show up; if you get four you're lucky. That's just the way volunteering works, but you can plan for it, and work to minimize the impact of no-shows. In general, expect anywhere between 20-35% no-shows.

DO YOUR HOMEWORK

The greater effort you make in recruiting and evaluating volunteer candidates, the lower that number will be. That's one of those instances where an ounce of prevention is worth a pound of cure. Though it does take more time on the front end, the more you get to know a candidate the better judge of character you are, and are more apt to screen out less reliable candidates

who might no-show. The more often you do this the better you'll get at properly estimating your drop-off rate.

HAVE A PLAN FOR EXTRA WORKERS

If you're smart and have assumed you'll get a no-show rate of X and planned accordingly, you still need to prepare for the contingency that more people show up than expected. If you need fifty volunteers, and assume 30% won't show up, logic says you need to recruit seventy volunteers total. But what happens if instead of a 30% drop off rate, you luck out and only get 15% drop off? Now you've got sixty volunteers showing up for fifty jobs. This should be your biggest problem, of course, but it still pays to game-plan for where you will slot extra bodies if/when they show up.

WALK-OFFS

THE HIDDEN DANGER

Walk-offs, people who simply abandon their posts during the event and leave altogether, present a very tricky problem. With no-shows, at least you know your staffing situation up front, before the event starts. Most events have volunteer call times that are one to three hours before the event starts, so the event manager has time to address the staff shortfall and deploy a contingency plan.

With a walk-off, however, the danger is the event organizer usually has no idea when and where the volunteer has disappeared from. The best case scenario is a volunteer who's fed up with their job or treatment and says out loud to others nearby, "I'm not taking this ---- anymore!" and storms out. At least in that case someone's likely to alert a supervisor.

More likely, however, is that the volunteer slips out into the night, and the planner doesn't feel the effect until much later in the event. It's time to deploy your volunteers to hand out gift bags or samples, and suddenly you're down two people who can't be found. Now you have to make an adjustment on the fly, while the event is in full swing.

BE UP FRONT ABOUT WHAT THEY'LL BE DOING

One of the most common reasons event volunteers walk off without finishing their shifts is being misled about the type of work they will be doing. This is an easy fix; be up front with them during the recruitment process about exactly what types of jobs they may be deployed in. Event organizers are sometimes deliberately vague on this front because they fear the jobs are so boring or simplistic that if they accurately describe the jobs the volunteers may not sign up. Here again, an ounce of prevention is worth a pound of cure. If you think the volunteer might not like a job, isn't it better to know that up front than to risk them walking off?

BE SURE YOU'RE MANAGERS ARE PROPERLY TRAINED

The other common reason event volunteers walk off is feeling that they're being verbally abused by their supervisors. Too often volunteers are managed by other volunteers, or in house staff, with little or no experience in training or managing a team.

In the worst cases, they order volunteers around like indentured servants, barking orders left and right. Live events present their own set of stresses, and not everyone is equipped to handle them. Those that are not so equipped should not be put in a position of authority over others.



Assigning managers to volunteers should be given the same level of care as you might give to assigning someone to manage paid employees. They need to have the right temperament and maturity level, and need to be given clear guidance on how to supervise their staff.

CONSIDER A MODEST STIPEND

Often if event organizers are unable to fill their volunteer ranks they'll resort to offering a stipend of \$25-50, which can be used to offset volunteer travel back and forth to the event site. Even with this expense volunteers are still a significant cost savings over paid labor. A stipend like this can also prove a powerful incentive for volunteers to properly complete their assigned shifts, and discourage walk-offs.

MOTIVATING YOUR VOLUNTEERS

MAKE A DIFFERENCE

Volunteers need to understand the connection between what they're doing at the event and the event's goal, as well as the event's goal and the organization's mission. In other words, they need to feel like they are making a difference in something. And it helps for them to be able to clearly connect the dots.

Properly engaging volunteers this way will go far in keeping them committed to your organization for the long term.

BE PART OF A COMMUNITY

Highlighting the inter-personal connections of the community they are part of can be a powerful motivator. Aside from the cause itself, volunteers respond strongly to feeling part of a community of like-minded individuals. They want to be accepted into, and impress, their peer group, and stay connected after the event is over.

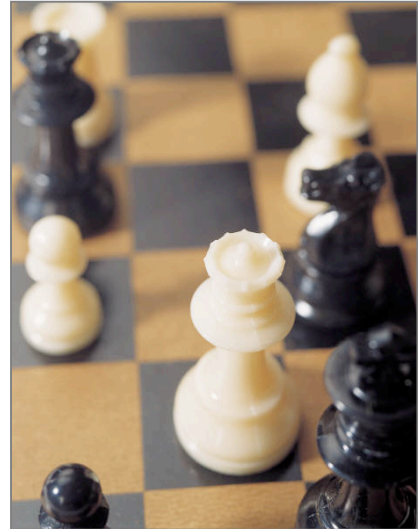
Sharing Facebook pages and Twitter hashtags of the organization / event can be helpful tools in keeping the community tight, building enthusiasm and connections leading up to the event, and letting them stay connected to each other and the cause long after the event is over.

ENHANCE/MAINTAIN A REPUTATION

In some cases, it can be hard to identify a compelling difference they are making. In those instances, some organizations have had positive results from focusing their motivation on the personal reputations of the volunteers, reminding them how important it is for everyone to do the same high quality work they are known for elsewhere in their lives.

THE STRATEGIC VIEW OF VOLUNTEERS

Unlike volunteers who work in an office or warehouse, event volunteers are usually in full view of, and interact with, event guests. And event guests, remember, are your organization's customers. Like it or not, they are representing your organization's brand, and should be treated with the same care as any other public-facing initiative that you might embark on, such as advertising, website design, product packaging, etc. People make judgments about your organization from all of these things, and the faces they see at your event are no exception. If you take only one thing from this paper, it's to broaden your view of event volunteers away from just the tactical, and to focus on them from a strategic perspective. Event volunteers are more than just the details of the jobs they perform; they represent your brand.



Smart planners recognize the importance volunteers play in their events and treat their selection and training accordingly. *"We take volunteers as seriously as we do choosing which caterer to hire or any other critical vendor,"* said Eileen Solomon, Director of Special Events at the Mount Sinai Medical Center in New York.

LEARNING FROM STREET TEAMS

The rise in the implementation of "street teams" by consumer brands in recent years gives us a window into how to view event volunteers from this kind of strategic perspective.

The idea of the street team is to send groups of people representing a product or brand into densely populated urban areas to distribute product samples, printed information and the like. Staffers are usually identified by wearing colored t-shirts, golf shirts or other apparel in the brand's colors, with the brand's logo and a slogan printed on them.

Street teams almost always are staffed by small armies of freelancers supplied by either a staffing agency, or the marketing agency implementing the program. They're typically paid by the day, with no long term allegiance to the product being marketed. They're not avid users of the product nor evangelists, and often have little familiarity with it at all.

That's what most street teams have in common. What sets them apart is the quality of the user interaction with them. We've all seen street teams that are perky, personable, well-informed

about the product and the company that produces it, and create a positive experience for the passerby. Unfortunately, too often we've seen the opposite: slovenly, unmotivated people who couldn't care less about the product, know next to nothing about it, and look like they can't wait to take off their silly t-shirt and get paid and go home. And in an era of social media, the lousy experience of one person can influence thousands. Instantly.

THE VOLUNTEER AS BRAND AMBASSADOR

The singular difference is that the companies that do this well treat the street teams as true brand ambassadors. They understand that, even though they will be associated with the brand for only a few hours, their impact on the public can be enormous. This philosophy infuses into every phase of the process: from recruiting to training to supervising. They don't cut corners on the hiring process, and they invest appropriate time in making sure that each person is a proper reflection of everything the brand stands for.

This issue is further amplified when dealing with event volunteers. For while the average person interacts with a street team for maybe ten seconds, in an atmosphere that they don't care much about, the average event attendee can interact with a volunteer numerous times. They're at the event for several hours usually, and have either paid to attend, or were invited by someone, and



either way they are much more invested in the time they spend there. So the negative effect of a sloppy, ignorant or incompetent event volunteer will have a far deeper impact on the host organization at an event than would a street team staffer to a passerby.

Further, while a fair percentage of people know that street team staff are hired guns, most event attendees have no idea who is a volunteer and who is not, so even if they did give some performance latitude to a volunteer in exchange for them donating their time, they can't do it if they don't know who's volunteering.

In all fairness, however, an event attendee should not have to expect a lower level of performance from a volunteer than they should from a paid staff person. The expectation should be the same, especially if the volunteer worker is in a "front of house" position, meaning they are in the event space interacting with the guests (e.g. registration), as opposed to "back of house" (e.g. stuffing gift bags in a back room).

FOSTERING CUSTOMER LOYALTY

The general public has little tolerance these days for anyone who is incompetent, whether it's a store clerk in person, a customer service rep on the phone, or a brand ambassador at an event. Brands that really nail the customer experience have been highly profiled, so the public knows there is a higher standard that is being met by others, and that is the standard they hold everyone to. A customer's experience with Apple, Ritz Carlton, or the Container Store, for example, is a uniformly positive one, in large part because these brands have made a point of making sure their staff at every position is a proper reflection of their ethos, their values, and their styles. They know that they can be judged by their weakest link. The resulting customer loyalty to these brands is through the roof as a result.

Event organizers should extend this same mentality to their volunteer staffing, and the ones that do will be taking a major step in setting themselves apart, and building deep, long-term connections with their guests.

TRAINING

SOFT SKILLS AND BIG PICTURE

Once we buy into the philosophy of event volunteers as true brand ambassadors, the need for soft skill training becomes readily apparent. While most event hosts do understand the need for task training (though not all implement this properly, as we'll address later), few think to address the soft skills. Event attendees, just like consumers, will tolerate someone who makes a mistake in their task if they have an accommodating



personality, show empathy, and make earnest efforts to fix the problem. Conversely, they will rarely tolerate someone with a bad attitude or someone who is clueless.

It doesn't require a huge investment of time to get a volunteer up to speed on some basic information that can make a big difference in empowering them to give attendees a better interaction, and properly represent your organization. They need to understand the big picture, why you're doing this event, and what it needs to accomplish.

HOST ORGANIZATION INFO

- What the organization does.
- What the organization stands for (values, mission).

EVENT INFO: BIG PICTURE

- Official name of the event (you'd be surprised how often that's botched).
- Purpose of the event, and how it fits into the organization's broader mission.
- Attendee demographics / profile, so the volunteers get a sense of whom they're dealing with.
- General idea of why attendees are coming to the event.

HOW THEY'RE EXPECTED TO LOOK & BEHAVE

- Dress code. Be as specific as possible.

- Any policies or restrictions on jewelry, piercings, etc.
- General customer service guidelines. For example, telling them to look the person in the eye and smile while responding to an inquiry goes a long way.
- No gum chewing.
- No eating or drinking within the main event area in view of guests. Schedule regular breaks and require they be taken in back rooms; if they're in sight of guests, not only does it look bad, but guests may assume they are working and ask them questions, detracting from the volunteer's ability to have a true break.

DETAILS

Event volunteers are often the first people guests turn for quick answers to their questions. As such, empowering them with basic information can go a long way toward helping your guests get their needs met, but also toward making volunteers feel useful and important. The information below should not only be shared in written form, but also explained orally, with locations of certain areas pointed out in person.

EVENT INFO

- Start time, end time, and other key timing elements (e.g. when there's a performance)
- Location of rest rooms (the most common question a volunteer is asked).
- Location of emergency exits and evacuation routes.
- Location of fire extinguishers, AED's (Automated External Defibrillators, the charged paddles that are used to jump-start heart attack victims).
- How to respond to an injured guest.
- Location of lost and found (if applicable).
- Any other basic info that can make them more productive.



JOB INFO

- Where they go to check in upon arrival
- Who they report to, including cell number
- How to obtain proof / credit (if they require it) for the hours they volunteered

FORMAT

Once you've identified the information to disseminate to the volunteers, the next step is to think about delivery methods.

WRITTEN

Distributing a one-pager to each volunteer upon checking in is the easiest and most common method to get them up to speed. With regard to common questions guests may ask them, an FAQ (Frequently Asked Questions, followed by short answers) is usually appreciated.

APPS / CELL PHONES

Forward thinking organizations are utilizing mobile devices to deliver this information.

Just about every volunteer has a cell phone, so simply texting the information in chunks insures they volunteer has quick access to it.

Developing simple smart phone apps is another way to get the information out there. Few organizations will invest the money to develop an app just for volunteer information; however those that are already developing apps for their attendees would be well served to add the appropriate info to a dedicated tab within their app.

VERBAL

The most effective way of getting a volunteer properly briefed is with a short oral presentation by a group leader. They can stress the importance of how guests should be treated, what the event is all about, etc. in a way that the written document cannot.

The only drawback is that when briefing large pools of volunteers, there's likely to be great variation in the quality of delivery among leaders. Likewise, when a volunteer arrives late and misses a briefing, they are without the requisite information.

As such, the best practice is a combination of both written handouts along with oral briefings.

MANAGING YOUR VOLUNTEERS

WHERE, AND WHERE NOT, TO PLACE VOLUNTEERS

One of the biggest tactical errors planners make with volunteers is placing them in positions they're not really qualified for. This tends to manifest itself in several areas.

MATCH SKILLS TO JOBS

If you're able to interview and evaluate volunteers in advance, it doesn't take much effort to make note of not only their specific skills, but also their demeanor, speech and overall presentation. Then you're in a better position to match them to a job that suits them.

For example, if someone's shy, they might do a bang-up job assembling attendee kits or gift bags, but would not be great as an expeditor (someone you deploy to keep a crowd moving, who barks out things like "If you're pre-registered, go to the red tables"). This benefits the volunteer and your overall event management plan.

Senior citizens might make enthusiastic greeters, but lousy runners. Students might make great runners, but might lack the confidence to be greeters.

NOTE LANGUAGE SKILLS

Whenever interviewing volunteers always be sure to ask if they speak another language, and make note of those who do, and the languages they speak. You never know when you'll need someone to translate, but if you do it's a lifesaver to know exactly whom to locate.

KEEP IT SIMPLE.

The ideal use for a volunteer that is showing up for an event, with minimal advance training, is in the simple, repetitive tasks. Stuffing attendee packets, gift bags, checking in people off a guest list, executing seat drops of material, etc. This enables the host to accommodate the broadest possible cross-section of volunteer skills and attitude.



AVOID RISK

Don't put volunteers in jobs where the risk of poor performance or negligence outweighs the cost-savings. For example, having volunteers man a coat check is not worth it. All it takes is

one lost coat or bag, and you'll regret it forever. Better to leave those types of jobs to paid individuals with experience in the specific task.

DIVERT PROBLEMS TO MORE QUALIFIED WORKERS.

Another best practice is to set up systems where any event attendee whom the volunteer cannot readily accommodate gets politely shuffled over to someone with more experience and decision-making authority. If a guest arrives at the check-in table and the volunteer can't find their name on the list, they should promptly be ushered over to a Help Desk, staffed with more knowledgeable workers. This accomplishes two things: (a) the guest with the problem is now dealing with someone better equipped to solve their problem, and (b) that same guest is no longer backing up the line by tying up the front line volunteer longer than necessary.

The volunteers should be told that virtually any situation that they haven't been told exactly how to solve gets similarly handled. Using the above example, there are likely dozens of potential scenarios they could be faced with: a person tries to bring an extra guest; they want to use a ticket bought by someone with a different name, etc. None of them matter. The volunteer should be able to decide within seconds if they can or cannot help the attendee. If the answer is no, the response should be automatic; get them to someone who can.

'NO COMMENT'

It's usually not a great idea to have volunteers interacting with the media, and in fact only people trained in media relations should be doing so. The last thing you need is a reporter or blogger getting their talking points and comments from some of the least informed people on your team, which volunteers inevitably are.

AVOID TEMPTATION.

While it may sound obvious, it's best to avoid putting volunteers in positions of responsibility anywhere near celebrities, famous athletes, politicians, and the like. The temptation to ignore their assigned tasks and stare is often too great. A number of years ago my firm worked on a business conference attended by dozens of heads of state, business icons and movie stars, and the client opted to station student volunteers at the doors of the various session rooms to check for proper credentials. Not surprisingly, a large number of them abandoned their posts to go inside and hear the speakers. When people are paying thousands of dollars to attend an event, that's not the time to skimp on costs and put volunteers in such critical positions.

MANAGE VOLUNTEERS LIKE YOU'RE RUNNING A BUSINESS

Once the training is complete, the next step is ongoing management and supervision. According to Rick Weaver, Chief Inspiration Officer at Lifeteacher, which specializes in volunteer management for associations, organizations that employ volunteers would be better served *“approaching volunteering from the perspective that you’re running a business, and treating the experience in a professional manner.”* This starts with effective management and supervision. *“Too often it’s volunteers managing other volunteers,”* with little training in how to manage a team.

ASSIGN MANAGERS CAREFULLY

The first step in preparing for a successful use of volunteers at an event is to make sure you’ve got qualified people supervising them. No matter how menial the task, a poor outcome in its execution can reverberate negatively throughout the event. If you’ve gone to the trouble to secure volunteers to perform a job, they need proper oversight, and there’s simply nowhere to hide an incompetent manager.

Managers of event volunteers need to be particularly sensitive to the fact that the people they supervise are donating their time, and will likely have a much lower threshold for not being treated properly. Further, an event manager may very well be in charge of people older and more experienced than they are, as people of all levels volunteer for things they believe in. Managers need to be comfortable giving direction to someone who is their professional and biological elder.

REVIEW EXPECTATIONS

While managers of both volunteers and paid workers each tend to explain *what* they need to do, volunteers are rarely told what level of performance is expected from them. It’s an easy fix to give volunteers a clear idea of what constitutes a job well done. Setting standards and performance goals, even for volunteers of events of only a few hours, can go a long way.

PROVIDE ONGOING FEEDBACK AND GUIDANCE

All workers thrive on feedback, and volunteers are no exception. It’s important to insure that their work is checked, and they’re not simply wound up and sent out into the field. *“People do what you Inspect, not what you Expect,”* said Lou Gerstner, the former CEO of IBM, who is credited with turning that company around. This not only gives the worker proper support, but insures that you’re getting things done the way you want.

DON'T BE AFRAID TO REPRIMAND

As mentioned earlier, too often managers of volunteers neglect to say anything they perceive as negative to the volunteer about their performance or attitude. They're afraid that because the volunteer is doing the work for free, it's not fair to give constructive criticism. And if they do, they rarely feel empowered to actually fire a bad volunteer. The whole concept of firing an unpaid worker seems off anyway. But the reality is that just as companies have to get rid of bad seeds who are not performing and become a drag on company performance, so too do organizations need to get rid of bad volunteers.

And if you're still uncomfortable confronting a lousy volunteer, consider the broader impact on the other volunteers that might have. *"Not providing constructive feedback to a volunteer that's not doing the job well, or has an attitude, has a negative domino effect,"* said Adam Sloyer, Managing Director of events agency Sequence. *"When other volunteers who are doing a good job see that poor performance goes unchecked, it becomes demotivating for them, which is the last thing you want to see happen."*

THANK THEM

AT THE EVENT

Volunteering at an event can be more stressful than volunteering in an office somewhere. They have to deal with the fast pace that comes with live events, the pressure of working of a tight timeline, and the challenge of interacting with hordes of attendees, each with their own unique demands.



Luckily, events also present unique opportunities for public acknowledgment that should be taken advantage of. Many events contain presentations, speeches and other moments where the audience is watching someone on a stage making remarks. That's a golden opportunity to recognize and thank all the event volunteers for their hard work.

Likewise, volunteers can be listed in the event journal or printed program. Seeing their names in print can go a long way toward making them feel recognized and appreciated.

AFTER THE EVENT

It's also important to thank volunteers for their work afterwards, both verbally and in writing. Let them know you appreciate their contribution of time and effort, and remind them how their contributions helped your event achieve the broader goals intended.

Consider throwing a volunteer party after the event if you utilized a decent number of them. Such gestures go a long way toward not only making them feel appreciated, but also toward weaving them into the community of your organization, and deepening their bond to their fellow volunteers.

Eileen Solomon of Mount Sinai Medical Center takes a group photo of all the volunteers at the event, and sends each one a copy afterwards, along with a hand-written thank you note, as a way to show the organization's appreciation.

POST-EVENT TASKS

SOLICIT FEEDBACK

Volunteers can be of great value to you *after* the event is over as well. Send out emails inviting them to take an online survey (there are several free or inexpensive programs such as www.surveymonkey.com or www.zoomerang.com). Solicit feedback on their job, their supervisor, whether their task met their expectations based on what was explained to them, whether they got out of the experience what they'd hoped, etc. Often you'll find they'll have some impactful suggestions for improving the event in general, which have little to do with their volunteer position.

TRACK VOLUNTEER PERFORMANCE

Not all volunteers are the same, and when you find exceptional ones you'll want to make note of them and track them in your database. Likewise, it's not a bad idea to indicate in the database which volunteers were disappointing. The event may be planned the following year by different people, and they'll appreciate having that intel.