

JOINT  
**AEI INSTITUTE**

**MARCH 12-15 | SAN DIEGO, CA**



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#AEI2024

# Dana Litwin, CVA

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## The 3 C's of Happy Volunteers

March 14th, 2024  
San Diego, CA



Every interaction with a volunteer is an invitation to stay, or an invitation to go...

***Shanti* Volunteer Engagement Motto**



...Yes, and it's fine to let some volunteers go and to say "no".

**Dana Litwin, CVA**

# Comfort Convenience Connection

# Comfort Convenience Connection

## Happy Volunteers



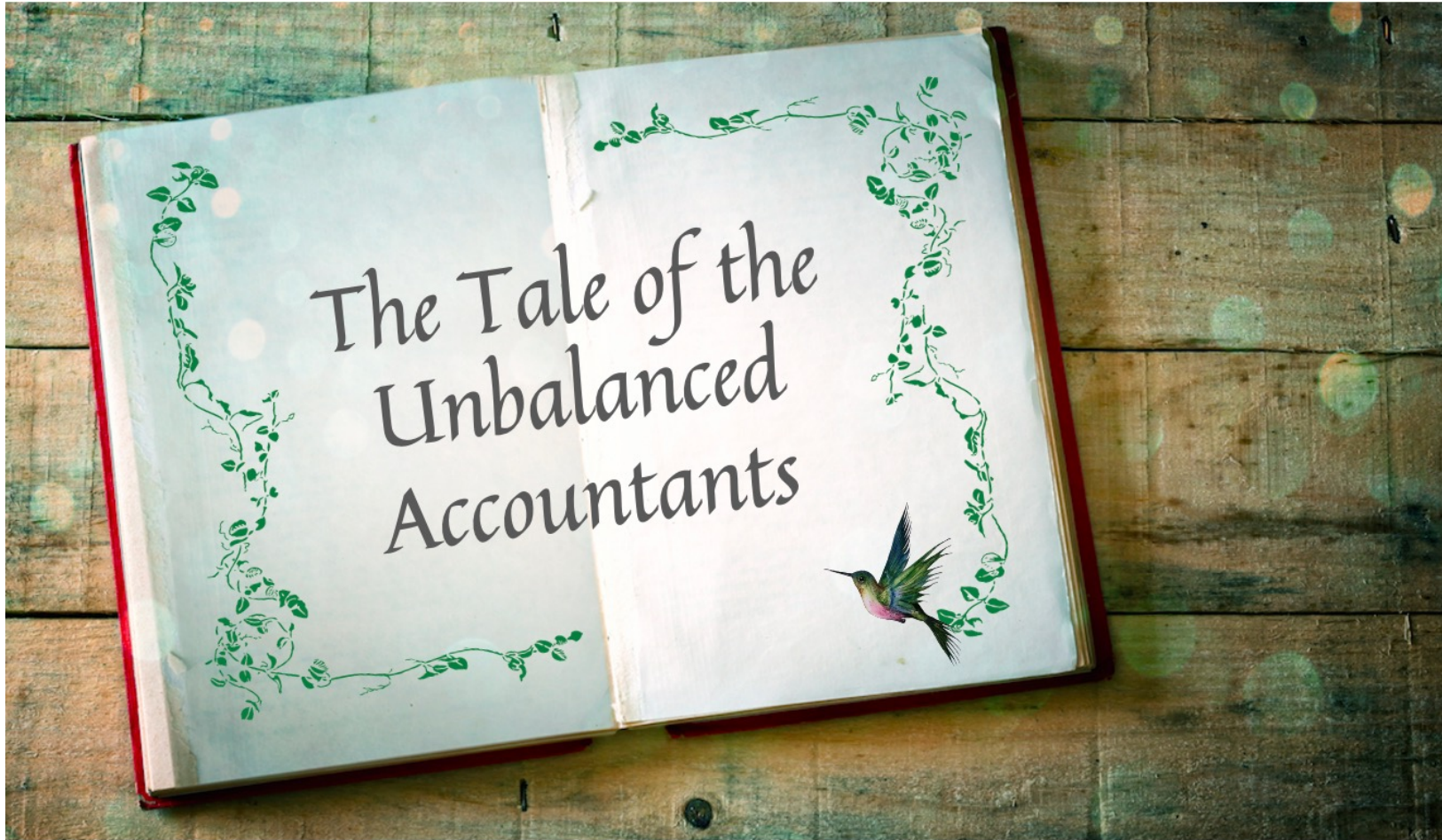
# The 3 C's Approach

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- Works with any program design
- Doesn't have to impact budget
- Mitigates risk
- Better to retain than retrain
- Meaningful work



# Comfort Convenience Connection





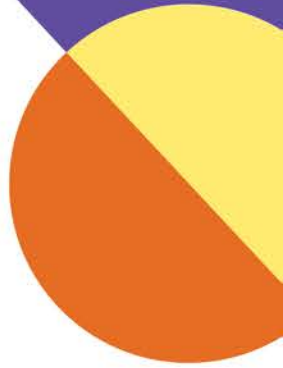
# Comfort Convenience Connection

The Unbalanced Accountants



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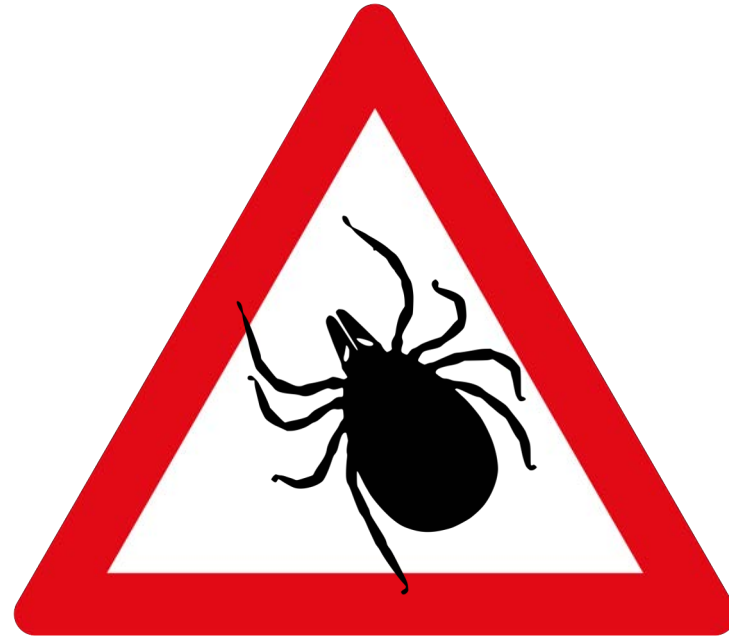
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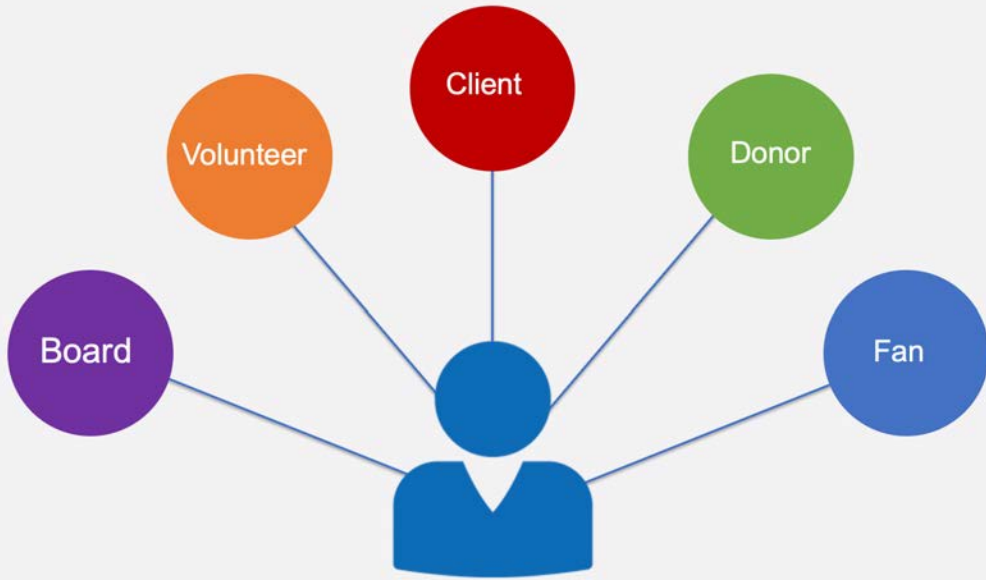
The Unbalanced Accountants



People commit when they have...

Comfort Convenience Connection





## Who are volunteers?

- Peers!
- Community members
- Multiple roles at any time
- Holistic vs. Hierarchical (ladder/pyramid) engagement model



# Comfort

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**Task**

**Training**

**Temperature**

**Tummy**



# Comfort



## Task

- Are **tasks** accurately described?
- Volunteers supervising others?
- Handling \$\$\$\$?
- Working with minors = background check?



## Task

- Unbalanced Accounts outside their Comfort zone
- Explained impact and meaning of their tasks
- Shared challenges = team building
- Set and meet (or exceed) expectations!

# Comfort

## Training

- Classes, online videos, or on-the-job training?
- Written procedures; handbook, manual?
- Role requires special skills, experience, or certification?
- Who pays for it?





## Training

- Costs to volunteer?
- Training same as paid staff?
- Clear roles and direct reports?
- Evaluation same as paid staff?



## Temperature

- Physical and emotional environment
- Indoor/Outdoor
- Day/Night
- Toxic Team



## Tummy

- Food & beverages for volunteers  
BYO or provided?
- Fridge, food storage space for  
volunteers (or just paid staff)?
- Food allergies accommodated?
- Kosher/Halal options?
- Fasting holiday?



# Comfort

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Are you comfortable with your **Task**?



Do you understand the **Training**?



How's the **Temperature** for you?



Is that your **Tummy** growling or mine?

When volunteers know you're thinking about their comfort and safety, you can find someone to do **anything**.



The Unbalanced Accountants





# Convenience

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**Time**

**Transportation**

**Technology**



## Time

- Assigned or Self-scheduled?
- Virtual or remote work?
- Shift flexibility?
- Any “bite-size” or micro-volunteering projects?



## Transportation

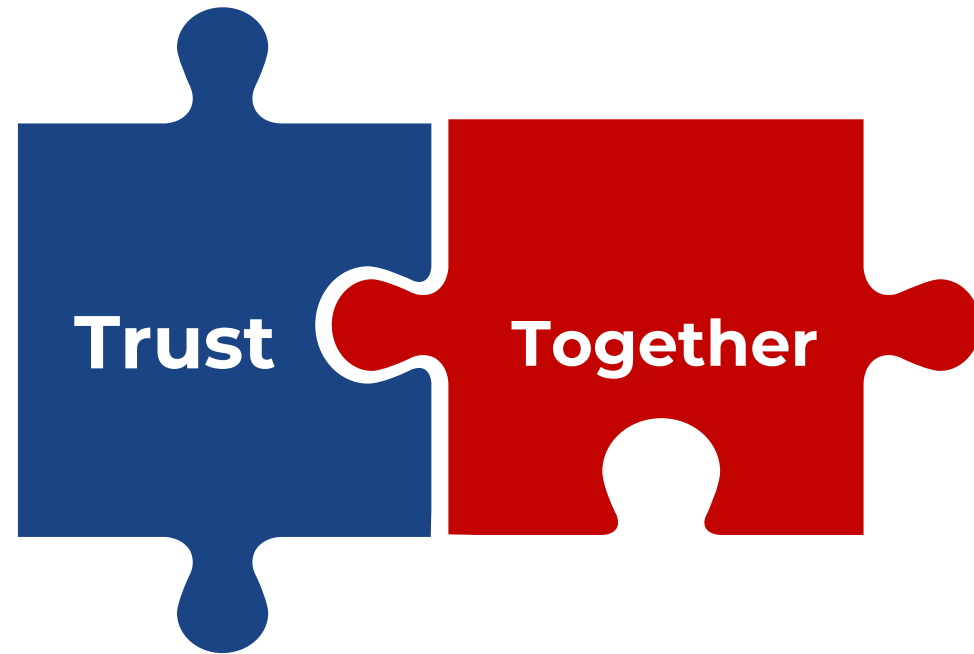
- Map and directions?
- Parking fees?
- Public transit proximity?
- Reimbursed gas/mileage?
- ADA accessible?



## Technology

- Digital divide?
- Technophobia?
- High-tech or low-tech?
- Reimbursed device/internet costs?
- ADA accessible online/in-person?

# Connection





- Trust is the currency of relationships!
- What is the **why** for volunteers?



- All one team!
- Shared goals
- Mutual support; we're in this together!
- Warm welcome never stops
- Diversity of team reflects the community



# The Balanced Accountants!





# The 3 C's Ideas to Action

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1

## Board & Beyond

How to accommodate volunteer expertise, beyond the BoD. What do you do with the other types of volunteers and how to deploy them?

2

## Special Projects

What are other roles, tasks, and projects that can expand capacity beyond the current ones? Take suggestions from all team members.

3

## Models & Templates

Core competencies for leaders of volunteers, templates for handbooks/manuals, policies, and processes.

# The 3's in Action

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## No Bored Board

Board members should all have working roles; chairing, supervising, or doing special projects. Does the BoD reflect the diversity of the community?



## All are #LoVols

Everyone knows the basics of volunteering, requirements, roles, and who to contact for volunteer issues or questions. All know the "Elevator Pitch".



## Specific Job Titles

Clear descriptions and titles for all roles, paid/unpaid. "Volunteer" is not a job title. Anyone leading volunteers for most of their role should have a title with Engagement, Coordinator, Manager, Administrator, Supervisor, etc.



## Learning Journey

Invite CEOs, Association Execs, staff specialists, communication staff, membership staff, etc. to learn volunteer engagement with the resources provided today.



## Leverage Headcount

Volunteers are headcount, and in some areas might outnumber paid staff. Changes made in volunteer services can positively influence other areas and departments.

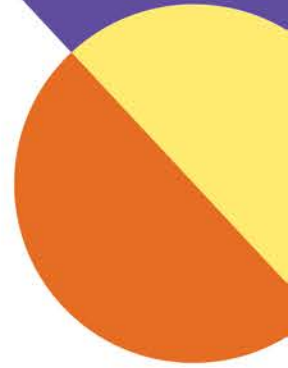


## Power & Accountability

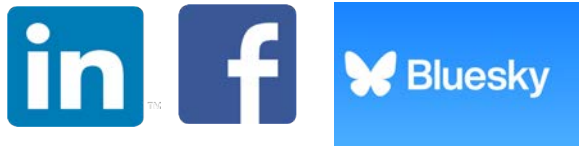
Model accountability and empower volunteers with leadership development, appreciation, and recognition.



# Q & A



# Contact and Social Media



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# THANK YOU.



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