



## **Chapter 4**

# **People: Building Your Volunteer Base**



# People: The Grassroots' Greatest Strength

People are as much of a resource as money and time. We already know that you can get people to donate their money; they can also give you their time. On a grassroots campaign or for any grassroots organization, people are the key to building capacity. Activists will do work that the organization would otherwise need to pay a vendor for.

The problem faced by many campaigns and organizations is a lack of understanding as to how to best utilize this resource. Activists are not a resource to be underestimated or taken for granted. Building a base of activists is similar to building a fundraising base. Each activity pursues donors. Some donors give their money, some give their time. Each group contains donors nonetheless, and should be treated with the same respect.

The first step in utilizing people as a resource - just as in fundraising - is to understand the donor's motivations, and the organization's needs.

## Why Do People Volunteer?

- Passionate about an issue(s)
- Recognition/ Feel Useful
- Loyalty/Aversion to Party or Candidate
- Opportunity for Advancement, Networking
- Social

No reason is better or worse than another. The important thing is to figure out what motivates people to donate their time. Remember they're getting something out of volunteering for you. Once you've figured it out, you can get the most out of your volunteers

Getting the most of your volunteers is a campaign skill. The first time the volunteers comes through the door, it is generally because of the candidate. The second time, and every time thereafter, it is because of YOU.

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**IF YOU ABSORB ONLY ONE THING FROM THIS SESSION, LET IT BE THIS:  
"You Don't Get What You Don't Ask For."**

You're too busy to do everything that needs to get done, but somewhere there is someone willing and eager to do it for you. You just need to ask. Cast a wide net; ask everyone. Ask big, ask for anything, ask for everything.

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## FIRST THINGS FIRST - Make A Needs Assessment

Never be in a position where you have volunteers with nothing to do. This will suck the momentum right out of your campaign.

Volunteers can be used anywhere and are especially helpful in the Field department. Always make a needs assessment of where you need volunteers, how many you need, and when you need them. This needs assessment should be broken down by department and date or time. You might need help with data entry on Wednesday, on a mailing on Thursday, and on a canvass on Saturday. Check around to see when people need volunteers.

It's often helpful to have a list of odd jobs and constant tasks posted up on the wall somewhere volunteers can see. If you have a surplus of volunteer time, or an unexpected eager volunteer, this list is available for anyone to plug into.

# Recruitment and Retention

## Where do I start?

Not surprisingly, the principles for recruiting activists are similar to those for raising money:

- 1) Start close to home. Whom do you know?
- 2) Then, cast a wide net.
- 3) Recruitment builds the campaign; always be recruiting.
- 4) The best recruiters are existing volunteers.

**Social Events** – BBQs, Meet-and-Greets, etc – are great for recruitment.

*“Hey, how are you? Remember to sign-in here, just so we remember to tell you when something is happening in your neighborhood. Drinks are over here.”*

**Volunteer Events** – Bring-a-friend components to your existing volunteer activities will boost your volunteer recruitment by encouraging volunteers to engage their networks. Incentives and friendly competitions work well.

*“Always happy to have some Little Rock for Dean volunteers at our event. I heard the Little Rock for Clark people are also coming. I think they said they’d bring 20 people. How many can you all bring?”*

**Recruitment Events** – Kick-off meetings, ‘emergency’ meetings, etc – are explicitly all about recruitment. People attend because they know something is up and they want to see what’s next.

*“Our EMERGENCY meeting is TOMORROW. The election is days away and the opposing candidate is outrageous. Your neighborhood is important and I need your help. Oh my goodness, can you come?”*

*“Busy? How about Thursday? Yes, that’s also an emergency.”*

## What do I do?

### Common Recruitment Tactics

- Volunteers referring other volunteers
- Outreach to other organizations
- Phone banks
- Canvassing
- Email announcements
- Flyering, Tabling, and Posters

Some tactics are more effective than others. The more personal the outreach, the more successful the recruitment tactic. Personal outreach often takes more time, however, and the trick is to find the right balance.

Volunteers referring volunteers is by far the best tactic because the campaign spends no additional resources (aside from managing the original volunteer well). Outreach to other organizations has a similar benefit. Phone banking is the best “bang for the buck” in terms of time and costs. Adding a volunteer recruitment component to canvassing is a must for ID canvasses.

Whether at a neighborhood BBQ or waiting in line somewhere, ALWAYS be recruiting.

### Here are some ideas:

- Former volunteers
- Friends and Family
- Voter lists
- Sign-in lists from events
- Donors
- Church, Synagogue, Mosque, etc
- Work colleagues
- Women’s groups
- Minority groups, ethnic associations
- Youth groups, clubs
- Environmental groups
- Service Organizations
- Dem Youth groups
- Dem Party Activists
- Labor unions
- Peace and Justice groups
- Senior organizations
- Fraternal Organizations
- Alumni groups
- Sports organizations
- Tenant Organizations
- Student groups

\*Remember, busy people are more likely to say yes.

(Why do you think they’re so busy?)

## Mastering the 'Ask'

You are a leader. Your job is to get your staff and volunteers to follow you. You set the tone. An energetic and enthusiastic leader will beget a focused and motivated volunteer base. People are attracted to excitement and positive energy. The more you exude this, the more your existing volunteers will actually feel it. You will attract more people, and you'll be able to keep them. Do everything with enthusiasm. Your attitude is reflected in your volunteer recruitment. **Remember, you set the tone.**

## THE MOST POWERFUL RECRUITMENT TOOL: ENERGY AND ENTHUSIASM

No Script? No Problem. Here are the five basic principles of any ask, "The Five C's"

- 1. Connect** – Establish a quick personal rapport. This is as simple as looking them in the eye, noticing a new haircut or cool button, or referencing a previous conversation.
- 2. Context** – Let them in on a piece of the strategy and how valuable a role they play in the strategy. This is an important and an effective use of their time.
- 3. Commitment** – Get a solid commitment. Use a solid ask. If you're ask is a roundabout question, you get a noncommittal answer. "Probably," "maybe," and "I'll try" are not "Yes."
- 4. Catapult** – Throw them into the commitment. Be excited about their answer and let your enthusiasm gush. Ask them who else they're bringing with them.
- 5. Confirm** – Give them a reminder beforehand of their commitment. Don't count of them until after a successful confirmation.

# Recruitment Math

## The Rule of Halves: an Ironclad Law in Organizing

It's simple:

- 1) Divide your confirmed "Yeses" by two.
- 2) Multiply your "Maybe's" by zero.

Need 10 volunteers for a day of canvassing? Get at least 20 commitments. If more show up, that's great. That happens. Be prepared. But always remember: The rule of halves owns you. Respect it. Use it.

### Make the math work for you: Confirm, Confirm, Confirm.

- Just because a volunteer said "yes" a week ago doesn't mean he or she is coming. Give him/her a call and confirm the day before and the day of the event.
- Emails are **not** confirmations. Phone messages are **not** confirmations. Hearing with your ears the word "yes" **is** a confirmation.
- Don't consider anything a "yes" until you've confirmed it once.
- **Then** cut that number in half.

**KNOW YOUR RATES** – To make quick educated estimates, campaigns will want to figure out a quick set of assumptions for the number of tasks a volunteer can complete an hour.

For example, we already know that of the people who agree, only half will show, but...

Of the people you ask, how many are likely to say "yes"?

Of the people you call, how many people will pick up the phone?

As you get to know your list of potential volunteers, you can begin to use more precise numbers for "yes" rates and contact rates. If, for example, your yes rate and your contact rate were both 50%, you'd need to call at least 80 people to get 10 people to show up at all.

**10 volunteers = 20 commitments = 40 asks = 80 calls**

If your 'yes' rate is 25% and your contact rate is 33%:

**10 volunteers = 20 commitments = 80 asks = 240 calls**

As you activate your volunteer base, you'll develop a better grasp on these rates and how they change over the course of the campaign.

#### **Good Rates to figure out:**

- Voters per household
- Doors knocked/ hour
- Doors contacted/ hour
- Phone calls/hour
- Contacts/ hour
- Volunteers yeses/ hour
- Voter data entered/ hour
- Travel time to parts of the district

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## RECRUITMENT MATH LESSONS:

- 1) Understand and learn to use rates and calculations
  - 2) Build a large recruitment pool
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# Plugging In Your Volunteers: Making a List and Crunching the Numbers

A campaign, like any major undertaking, can be broken down into a series of tasks. Successfully managing and coordinating your volunteers requires a thorough understanding of these tasks. Even something simple such as holding a quick visibility rally should be broken down into a set of tasks so that you can assign volunteers where you need them. A few simple steps can help you allocate your volunteer resources efficiently.

## THE BASICS OF VOLUNTEER ALLOCATION

- 1) Create a list of tasks needed to complete an objective.
- 2) Calculate the time it takes for each task to be finished.
- 3) Determine how many volunteers it will take to finish the required tasks in the time you have.
- 4) Assign Volunteers.

### Example: Voter contact.

*How many volunteers do we need to canvass 2500 voters in Sedgwick County in one weekend?*

- 1) Figure out how many houses there are in the county. Often, multiple registered voters live in the same household. The number is usually substantial enough that it factors significantly in calculating how many voters per 'door knock.' This information is available directly from an enhanced voter file, or just by looking at your lists and doing some quick math. 60% is a good default estimate if you don't know your number.

Number of Target Voters <b>(2500)</b>	x 60% =	Number of Target Houses <b>(1500)</b>
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- 2) Identify how many houses a volunteer can reach an hour. This number will vary depending on population density, residential zoning, houses vs. apartments, etc. **The best way to get an idea of this rate beforehand is to scout the turf with staff or volunteers.** Let's assume we're in an older single-family housing area of town. Nine door contacts/ hour is a good estimate.

Target Houses <b>(1500)</b>	Contact Rate (HH's/hour) <b>/ 9 =</b>	Volunteer Hrs Needed <b>(167)</b>
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- 3) Calculate # of reasonable hours exist to complete the task. Good canvassing hours may vary slightly from neighborhood to neighborhood, but generally:
  - Saturday = 10am - 4pm = 6 hours
  - Sunday = 12pm - 6pm = 6 hours
 Generally, you can schedule a canvass shift to last three hours (not including set up or training). Your total for the weekend is 12 hours or 4 shifts, two each day.
- 4) Calculate how many volunteers you need to fill each shift.

Vol. hrs. needed <b>(167)</b>	/ # of shifts <b>(4)</b>	/ 3 hours <b>(3)</b>	= Vols per shift <b>= 14</b>
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- 5) Conclusion: To reach 2500 targeted voters in one weekend through canvassing, we need to have 14 volunteers for four shifts, a total of 56 volunteers. The rule of halves dictates that we would, in fact, need 112 volunteers to commit to the weekend canvass.

**Campaigns do the math.** The above is an example of a small objective with only one major task. More complex objectives require more planning (see the planning section of this training). If you do the math, you'll be able to predict and troubleshoot any potential problems or shortfalls.

## Building Your Activist List – Data Collection

As with any resource, an organization must track how activists and potential activists are being utilized. In order to do this, the volunteer operation in a campaign must be meticulous in collecting relevant data. An organization needs to know who is signing up, who is showing up, what they did, and how to contact them again. Tracking this data not only helps you get people back in the door, but can also indicate areas of improvement in the recruitment and management of your activists.

If the volunteer has signed up online or via email, the absolute minimum information the organization must collect is email and zip code. For in-person sign-ups, the minimum information to collect is name, phone number, email, and zip code. In addition, collect alternate phone numbers, address, event volunteered, date of last contact, and how the volunteer came to know about the volunteer opportunity. It is often a good idea to have a standard “Volunteer Sign-up Form” which asks for this info. (see following page for example).

### Events

Regardless of the primary purpose of any event (earned media, engage donors, etc), a great byproduct of any event is a fresh list of potential volunteers. People who might not otherwise volunteer might go to an event, become motivated, and sign up for more. Make sure you have a well-organized data collection plan for each and every event where you expect the public to attend, no matter how obscure.

Of course, they’ll only sign up if you ask them. Or make them.

### Once They’re in the Door

When a volunteer does show up, you’re still collecting data. Just as in any event, volunteers sign-in. Your list is more than a list of people who might show up; it’s a list of people who can do the work of the campaign. On top of the contact info you already had, you need:

- Who actually shows up
- When they show up
- What they did, what they like to do
- Best way to get in touch with them again (confirm contact info)

### Before They Leave

It’s important to debrief a volunteer after he or she is done for the day. Do not underestimate the importance of asking a person how the activity went. In addition to making the person feel valuable, it allows you to anticipate problems and opportunities. It is also a great way to confirm your data and obtain another commitment. Every debrief ends with another pitch for the next volunteer opportunity (so be ready), or better yet, a pitch for establishing a regular volunteer commitment.

#### Data Collection Tip:

People might not want to give a stranger their contact info, but seem to love to “sign up to learn more.” It’s a less intimidating way of saying “expect my call.”

#### Volunteer Event Tip:

Ideally, these social events will soon mesh with volunteer events: “Come on over, we’re having an envelope stuffing *party*. Susie’s bringing cookies.”

# Volunteer Sign up Form

Our campaign needs energetic volunteers! Please let us know how you can help us take our country back!

<b>Name:</b>	<b>Home Phone:</b>
	<b>Cell Phone:</b>
<b>Address:</b>	<b>Email:</b>

What is the best way to contact you?

## I can help the campaign by:

(Please circle)

- |  |                           |                        |
|--|---------------------------|------------------------|
| <b>Door knocking</b>                         | <b>Phone calls</b>        | <b>Mailings</b>        |
| <b>Registering Voters</b>                    | <b>Data Entry</b>         | <b>Poll Watching</b>   |
| <b>Yard Sign Assembly</b>                    | <b>Yard Sign Delivery</b> | <b>Office clean-up</b> |
| <b>Creating Walk lists &amp; Call sheets</b> | <b>Event Staffing</b>     |                        |

**My special talent:** \_\_\_\_\_

## I am available to help:

- |                                 |                           |                     |
|---------------------------------|---------------------------|---------------------|
| <b>Weekdays 9am-5pm<br/>5pm</b> | <b>Weeknights 5pm-9pm</b> | <b>Weekends 12-</b> |
|---------------------------------|---------------------------|---------------------|

**Comments:** \_\_\_\_\_

Thanks! We will be in touch in the coming weeks with volunteer opportunities!

# Volunteer Management

## Working With Volunteers: Key Principles

### Volunteers are valuable – let them know.

- Every volunteer should be greeted upon entering the office, and debriefed on the way out.
- Never leave a volunteer standing or sitting doing nothing. This is true even if the office is especially busy. A busy office with a bored volunteer indicates a failed volunteer program.
- Thank volunteers profusely.
- ALWAYS provide context for the tasks at hand.
- Feed volunteers. Have food constantly available. If you feed volunteers only candy, they will crash or become irritable if they are there for more than a couple hours. This is especially important on E-day. On E-day, deliver the food yourself.
- Pass out perks (free swag, picture with the candidate, etc) to your best volunteers.
- Be creative with recognition. It doesn't need to be anything fancy. Taking pictures of your regular volunteers and putting them up on the wall is a classic, and effective, form of recognition.

### Give specific tasks and set clear goals.

- A specific, quantified goal gives volunteers a sense of purpose and direction beyond simply “we gotta win the election.” How does this activity win the election?
- Goals should be product driven, not time driven. The campaign needs 1000 envelopes stuffed, not four hours of envelope stuffing. Product-driven goals focus volunteers on the task, not the clock.
- Achieving a challenging goal gives volunteers a sense of accomplishment.

### Lead by example.

- Volunteers are more efficient when you are nearby, working or supervising.
- The second most inspiring sight for volunteers is to see staff roll up their sleeves and do the dirty work alongside volunteers.
- The most inspiring sight for volunteers is seeing the *candidate* join in.

### Before they leave...

- Schedule a time for volunteers to come back again.
- Better yet, work out a schedule for the month.
- Make sure you do a quick debrief to see how everything went and to give them forward momentum for when they come back. Ask big, ask for a lot. Plug them into leadership positions quickly. They can handle it.

### Campaign Communication

The two smartest statements to be made in a campaign:

1. “I don't know.”
2. “I have a problem.”

From Volunteers to Campaign Managers, everyone should learn to embrace these phrases. These are the phrases you hear before a small problem becomes a big one. Listening to volunteers' concerns and encouraging them to express them will allow you to spot problems before they grow. The bottom line is that you're working on the campaign because you want to win, and if something is unclear it's in everyone's interest to have it cleared up. A good manager or organizer is constantly listening to those under, above, and around them to prevent the growth of any problems.

# Training Your Volunteers

**To make the best and most dependable use of volunteers, the campaign must train them. Frequently.**

The best way to train adults is to actively involve them in the training; have them learn the task under your supervision in a way that gives them hands-on experience.

**A typical training agenda is simple:**

1. **Contextualizing.** Give the volunteers the big picture, and how their task fits into it.
2. **Telling.** Spend a small amount of time telling them how to do it.
3. **Showing.** Spend a little more time doing it once in front of them.
4. **Doing.** Spend the most time doing a role-play with you in their role (or have them do it in front of you).
5. **Expecting.** If you think they can do a better job do it with them for a bit, showing how you like it done.

**Spend most of your training time on role-plays!**

## A Good Training:

- **Invests the volunteer in the success of the campaign by putting the activity in the context of the campaign.**
  - “We NEED to respond to our opponents attacks. These mailings will raise enough money to do that, but only if we send them out quickly and send them out right.”
- **Serves as quality control for the campaign**
  - Activists represent the campaign in the eyes of the public. Activists should not start working for the campaign until the campaign is confident with the volunteers’ skills.

## Train, train, and retrain.

No matter how trained a volunteer, it will always be a good idea to continue training them. Campaign volunteers should begin to expect brief trainings at the beginning of each volunteer activity. Rather than becoming bored of the training, they will appreciate it. Volunteers will understand the importance of the task itself and the time spent doing it. This will also give them the confidence to move to other projects, knowing that the campaign puts a priority in preparing volunteers for tasks.

Involve your experienced volunteers in the training itself. For a volunteers who’ve become used to the mini-training session before each activity, have them run the training itself. This gives them ownership over their piece of the campaign, and another opportunity to hand out a meaningful campaign title, “phone bank shift trainer,” for example.

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## Retention and Attrition

**No Fun:** Working on a campaign is different than any volunteer's day job. It's interesting and should stay that way. Have busy, colorful walls and music in the volunteer spaces. Frequent after-work or after-event socials are easy ways to keep things lively.

**No Love:** No matter the motivation of the individual volunteer, everyone wants to be recognized for hard work. Thank them. Recognition is free, give it away. You haven't thanked your volunteers enough unless it feels like a little too much.

**No Growth:** The volunteer should be growing in his/her roles, given more responsibilities, or at least new roles. Stagnation is boring. Boredom leads to attrition. The campaign should also be growing and gaining momentum. Even the most common tasks and responsibilities take on a greater significance to the volunteer when that volunteer is given a title.

**Burn out:** Volunteers may be given too much responsibility too early. This kind of attrition can be predicted. Volunteers don't drop off the face of the Earth. If you spend time and listen to your volunteers, you'll know who among them feel overwhelmed. Don't be afraid to ask for more out of your volunteers, but be mindful of their needs.

**Elitism:** Campaigns can turn into an "us vs. them" situation in the office: staff vs. volunteer, primary election volunteers vs. 'bandwagon' volunteers, veterans vs. newbies. Close ties should be encouraged, but cliques are destructive. Encourage staff to socialize with volunteers. Veterans like to feel like insiders, so have them take newbies under their wings, show them the ropes, etc.

**Having A Life:** As volunteers become more involved in the campaign, they lose time with family and friends. If your activists feel like they need to have a life, that's great. Encourage activists to bring their friends and family to campaign activities.

**Internal Conflict:** No one likes office politics. Whatever internal struggles are waged behind closed doors should stay there. Volunteers should be shielded from any internal drama or disagreement. They will either leave because of tension, or worse, they'll have an opinion on the whole matter.

**Forgone conclusions:** Sometimes you just know that you're going to win or lose. But there's still work to be done. Let them know how important their work is. Use examples of upsets and underdogs, fatal bloopers and sudden surges.

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## Volunteers Are Not

**\*Volunteers are not "free" labor.** They take time, energy, and food. It costs the campaign resources to recruit, train, and manage your volunteers. Volunteers know when they're merely warm bodies.

**\*Volunteers are not staff.** Staff can be held accountable relatively easily. Staff will not randomly leave the job or decide to stop showing as volunteers frequently do. You can also expect staff to do a more professional job. Volunteers will take more time and make more mistakes than if you hired staff or a campaign services firm. Going with volunteers is a choice with an opportunity cost.

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## Leadership Development

A grassroots campaign is never run on staff alone, nor can any campaign be run entirely by an irregular volunteer force. Campaigns and grassroots organizations depend on leaders. These leaders are more than occasional helpers; they hold positions of responsibility.

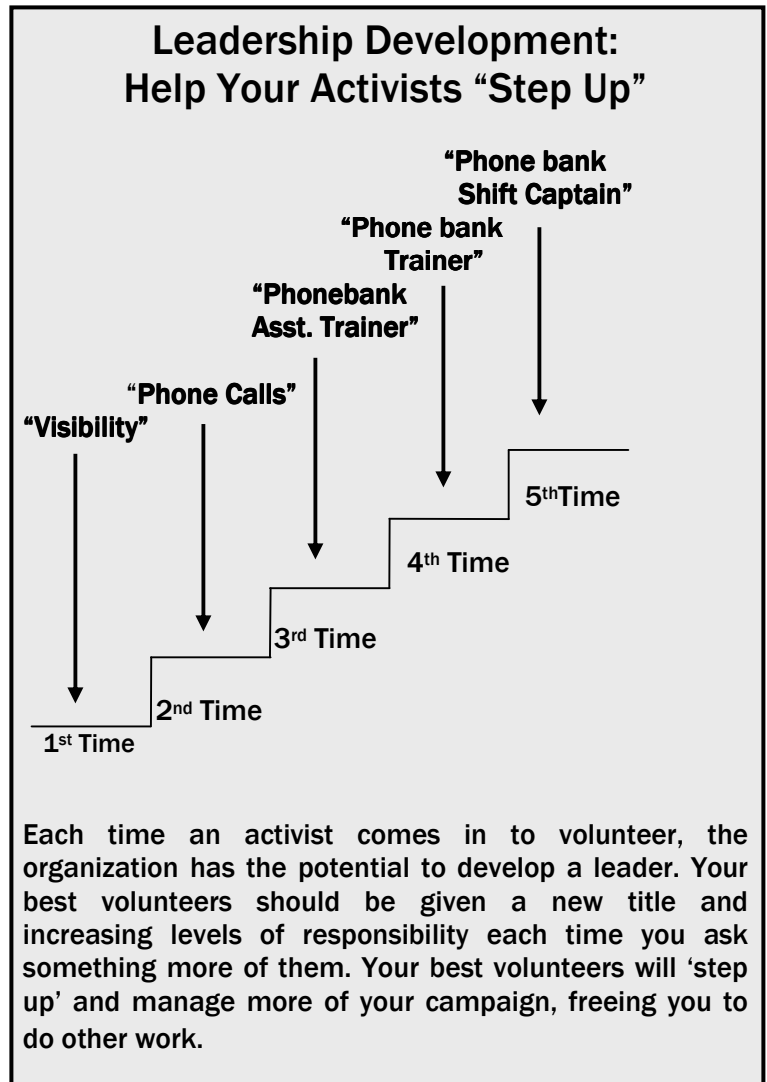
### Leaders Are Never Born. They Are Developed.

Although it's possible some previously unknown superstar activist might walk onto a campaign, it's unlikely. An organization should develop leaders among existing volunteers. Spending the time to develop leaders is an investment. Having a capable volunteer in charge of phonebank shifts frees up field staff to complete other tasks. The time spent developing these volunteers in the beginning pays off when the campaign has less and less time.

Leadership development is not spontaneous. Leaders are those who are given real responsibilities, thrive on feedback, and keep coming back for more. For this to happen, the organization must give the activist responsibilities, feedback, and opportunities. Leadership development is in the hands of the organization. The organization chooses to develop leaders or chooses not to have any leaders.

### If You Want Something Done Right... You Have to Stop Trying to Do Everything!

Many groups have a 'do-everything' kind of leader. These groups disintegrate when that leader burns out, leaves, or is no longer able to lead the organization. These leaders allow their own efficiency sabotage the growth of their organization. Giving activists more responsibility develops them as leaders and will benefit the campaign or organization in the long term. The diagram on the right shows how an organization can develop leaders by giving activists increasing levels of responsibility. Activists will choose a level comfortable for them, but existing leaders must give activists the opportunity to take ownership over a piece of the organization.



### Work With the Best.

Because resources are limited, leadership development requires prioritizing. Which activists have the most potential to become leaders? An hour spent training a stellar volunteer produces more than an hour spent on a mediocre volunteer. Everyone should be trained and given your attention, but some activists are simply more effective than others. These activists should be given a role suited to their strengths.

### Set Expectations and Hold Leaders Accountable.

Activist leaders thrive on high expectations. When invested in a goal, a leader will come through for a campaign or organization. Too often, people fear burnout so much that the opposite occurs and potential leaders are lost.

