

MBA CSEA

Volunteer Management Plan

The overall management of volunteers is overseen by the Executive Director in collaboration with the Board Liaisons for each committee. All organizational leaders, including Board Members and other committee chairs, have the responsibility for ensuring a positive experience for volunteers.

Benefit to the Organization

Although MBA CSEA employs employees and consultants to meet ongoing and specific needs, a significant amount of the work is completed by volunteers who remain the lifeblood of the organization. They put a significant amount of time into the organization above and beyond their full-time jobs. Their work cannot be properly quantified or over appreciated. MBA CSEA holds the work of its volunteer board members, committee chairs and committee members in very high regard and puts forth great effort to attract, retain and recognize volunteers, without whom the organization would not be successful.

Benefits/Reasons for Volunteering

MBA CSEA volunteers have stated the following major reasons for and benefits to volunteering (in order of importance):

- Giving back to the organization and the industry; seeing their contributions add value.
- Meeting new people, collaborating, being a part of the team.
- Enhancing personal and organization brand.
- Learning new skills.
- Gaining recognition within their own organization.

Volunteer Recruitment

MBA CSEA is a member-driven organization. All programs, services and thought leadership are generated and/or vetted by members. As such, the preference is for all volunteers to be active MBA CSEA members. Exceptions can be made in times when non-members can provide expertise or active involvement based on specific needs and/or when membership is not feasible based on external factors.

Volunteers are recruited in the following ways:

- Announcements and sign-in sheets at all MBA CSEA in-person conferences and sign-ups on conference evaluations that are distributed after the events.
- Annual “Call for Volunteers” email for all committees sent by the Executive Director in July/August, with additional emails and other communications as needed throughout the year.
- Ongoing information on the MBA CSEA web site.
- Word of mouth through committee chairs and other volunteers.

- At the Global Conference, the Board typically hosts a Meet 'n Greet for interested volunteers to learn more about what each committee does.

Selection and Screening Process

To maximize the experience for both the volunteers and the organization, a selection process is used to ensure volunteers are in a role that makes sense for them. Volunteers are selected based on a number of factors, including:

- Skills set and fit for the position.
- Prior involvement with MBA CSEA or other similar organizations.
- Time available to volunteer.
- Interest in volunteering; passion about the organization.
- Geographic location (for international opportunities).
- Knowledge needed for the position.
- Diversity.
- Ability and desire to work within a collaborative virtual environment.

As much as possible, efforts are made to match volunteers with the opportunity that is the best fit for them based on the criteria above as well as any other determining factors. See individual committee Standard Operating Procedures for specific committee criteria.

The committee selection process is as follows:

1. Volunteers express interest via a conference evaluation, in-person sign-up, or communication to a member or staff. Names may also be recommended by committee leadership.
2. All volunteers must complete a Volunteer Form, which can be found within their login at: www.mbacsea.org. The form requests information about committee interest, skills sets, and reasons for volunteering. The form is located within the login in order to ensure that every volunteer is an active member. Non-members can express interest directly to the Executive Director.
3. Once the forms are completed, the Executive Director conducts the initial screening and makes committee recommendations based on information provided on the form as well as recommendations from committee chairs.
4. Recommendations are passed along to committee chairs, who then reach out to the volunteers to confirm their interest/selection.

Leadership Positions and Succession Planning

Building successful leaders is critical to the success of MBA CSEA's programs and services. To the extent possible, committee and subcommittee leaders are selected based on (but not limited to) the following criteria:

- Leadership experience and skills set, including: ability to effectively manage diverse teams, ability to manage volunteers, flexibility and ability to work well with changing timelines and team members, positive attitude about MBA CSEA and volunteering.
- Firm understanding and commitment to MBA CSEA's mission and vision.

- Strategic mindset/focus – ability to make decisions that help fulfill the organization’s mission and vision and contribute to the long term success of the organization.
- Time available to volunteer (leadership positions require more time investment than committee members).
- Prior involvement and success with MBA CSEA, preferably in the area/committee in which they will be leading.
- Commitment to the goals and success of the committee they are leading.

Committee Chairs are selected by the President and Executive Director, with feedback from board members and others as appropriate. Subcommittee chairs are selected by the Executive Director, Board Liaison and Committee Chairs for each respective committee.

Succession planning is ongoing. Committee chairs and board liaisons to each committee continuously look for leadership qualities in committee members.

Volunteer Training

Proper training ensures continuous support for volunteers to be successful in their positions. Training is the responsibility of all leaders associated with each committee. Each new volunteer participates in a virtual New Volunteer Orientation, which consists of:

- MBA CSEA history, mission, vision and values
- Organizational structure
- Committee descriptions and roles
- Resources available for committee members, such as the Standard Operating Procedures, timelines and project management tools
- The importance of volunteers
- Expectations for committee members

The Executive Director creates the Volunteer Orientation and distributes it to volunteers each year in July. Committee leaders also encourage committee members to participate in the training.

Committee chairs (including subcommittee chairs) are responsible for ensuring all committee members read and understand the SOP’s and utilize the tools provided to the committees, such as OneDrive and Smartsheet.

Leadership Training

When possible, new leaders are selected well in advance to give them the opportunity to shadow the current leaders. Past leaders are encouraged to train each successive leader in the way most appropriate to them. Training consists of: providing all appropriate documentation, including Standard Operating Procedures (the Executive Director works with committees on these) and providing tips for success. The Executive Director is included in all leadership transition meetings to ensure ongoing information exchange and historical insight.

In addition to the New Volunteer Orientation, committee chairs (including subcommittee chairs) are provided with a Committee Chair toolkit (<http://www.mbacsea.org/committeechairs>) for ongoing

reference. Committee chairs are strongly encouraged to read through the documents in the toolkit and use it as a reference throughout the year. The toolkit includes:

- A link to the Volunteer Orientation video
- An overview of organization roles, including the Board of Directors, Committee Chairs and Consultants
- Committee Resources, including document archives and project management tools
- Standard Operating Procedures (note: these are also included within each committee's documentation archive in OneDrive for committee member reference).
- Tips & Guides, including how to run a virtual meeting, how to successfully manage volunteers, a checklist for new leaders and sample meeting agendas
- Leadership Succession, with tips for how to help the organization develop future leader/

Expectations

MBA CSEA provides volunteers with proper training and recognition, as well as appreciation for their time and efforts. Volunteers are expected to:

- Dedicate appropriate time and effort to their volunteer role in order to achieve their responsibilities.
- Notify appropriate leadership if any circumstances arise that will now allow them to complete their role or any particular responsibilities.
- Read and understand all committee documentation, including roles, responsibilities and guidelines, and ask questions if anything isn't clear.
- Support the mission and vision of MBA CSEA.

Rewards & Recognition

Volunteers are recognized and appreciated for their efforts in the following ways:

- Board members and committee chairs receive a \$100 discount on conference attendance (at the conference of their choice). Subcommittee chairs receive a \$50 discount.
- Ongoing verbal thank you's and recognition from appropriate leadership. Committee chairs are encouraged to send thank you cards to committee members.
- Written recognition as appropriate for the committee (i.e. conference committee names appear in conference programs, other committee names appear in emails to membership, etc.).
- Written recognition on MBA CSEA web site (Board members and Committee Chairs).
- Written recognition on PowerPoint slides (or other visual format) at conferences, as well as other conferences as appropriate.
- Certificate of appreciation signed by the President and Executive Director mailed to each volunteer in July.
- Email to their supervisor(s) recognizing and thanking them for their efforts in August.
- Conference subcommittee co-chairs may participate in a dinner or appetizers with their committees as appropriate before or during the conference.
- MBA CSEA will hosts a reception at the Global Conference that is open to all volunteers.
- All volunteer recognition expenses will be board expenses, as determined by the available funds each year.

Outcomes Assessment

- The Volunteer Plan is reviewed yearly by the Executive Committee.
- The Board Liaison for each committee assists the Executive Director with making sure Committee Chairs are utilizing the resources available to them and following through with volunteer rewards and recognition.
- A volunteer survey is distributed yearly to all volunteers to gauge satisfaction and areas of improvement.