Age Positive 2019 Conference
May 8, 2019
Session

Maximizing Your Workforce with the Energy of 50+ Volunteers –

_Do We Have the Right Tools in Our Toolkit?_

Presenters

Debbie Bass, MPA, CFRE
National WWI Museum and Memorial, Vice President of Development

Sandra Mellinger, BSN, CEO
Coming of Age Kansas City

Lynn Wild
Retired, Community Volunteer
About the Presenters

Debbie Bass, MPA, CFRE
National WWI Museum and Memorial, Vice President of Development
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During her 30 year fundraising career, Debbie Bass, MPA, CFRE, has been responsible for raising $45 million. She owes her success to believing in mission and being able to see first-hand how lives are changed. In January 2014, Debbie joined the National WWI Museum and Memorial as Vice President of Development. Thanks to great leadership and campaign cabinet, the Museum exceeded its $25m goal a year early raising nearly $28m, with 15 leadership gifts.

Sandra Mellinger, BSN, CEO
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A lifelong resident of the Northland, Sandra Mellinger is a prominent civic leader dedicated to the citizens of Kansas City. She has spent her career serving the senior population, particularly in health care. She is Director of Coming of Age Kansas City, which offers two indispensable programs for seniors: Explore Your Future and Capturing the Energy. Sandra has received numerous awards and recognition by the community for her leadership and philanthropic efforts over the past several decades. She is a recipient of the following awards and honors: recipient of the 2007 Look North Award, presented by Clay County Economic Development Corporation; induction into the North Kansas City High School Hall of Fame; recipient of the Outstanding Alumnus of the Year Award from the University of Missouri, Sinclair School of Nursing; recipient of the the Distinguished Alumnus Award – Kansas City Tomorrow; recipient of the Anne Robb Townsend Award; recipient of the National Recreation and Parks Association-Outstanding Parks Commissioner of the Year; recipient of the the KC Gillis Spirit Award; selected for Women who Changed the Heart of the city by City Union Mission; and honoree for the Buck O’Neil legacy seat at Kauffman Stadium, among others.

Lynn Wild
lcwild69@gmail.com

Lynn Wild, retired as Senior Services Librarian from the Johnson County Library System in Overland Park, KS in October 2015. He has volunteered at the National WWI Museum and Memorial since April 2016 and has volunteered in the Edward Jones Research Center for 2 years.
Opening Remarks (2 min)  Sandra Mellinger

Visualization Exercise & Checklist (5 min)  Debbie Bass
  Setting the tone - prize give-aways
  Great volunteer experience – 3 key words
  Bad volunteer experience – 3 key words
  Checklists

Key Tips to Successful Volunteer Program

Nuts & Bolts (10 min)  Sandra Mellinger

Conducive Culture (5 min)  Lynn Wild
  Volunteer Poem, National WWI Museum and Memorial’s Volunteer
  Program Manager’s comments, 3-5 examples

Ways to Volunteer

Hands-on/ “In the Trenches”  Sandra Mellinger

Committees/Indirect  Debbie Bass
  Gala, campaign, and planned giving job descriptions

Questions & Answers  Lynn Wild
17 Excellent Reasons to Volunteer in 2019
Giving USA 2019

1. It’s good for your health
2. Hello career booster
3. Learn new skills
4. Real world experience
5. Make an impact
6. United Nations sustainable development goals (not to rely on government)
7. Give back to a cause you believe in
8. Help to empower another
9. Travel responsibly (travel with a purpose)
10. Make real connections
11. Learn a new language or subject
12. Become part of the community
13. Gain a whole new perspective
14. Explore more
15. The food/culture
16. Get inspired
17. It’s fun!

Why People Volunteer
Positive Force Consulting 2012

- Give something back to an organization that has impacted on a person's life, either directly or indirectly
- Help the environment
- Help others less fortunate or without a voice
- Feel valued and part of a team
- Spend quality time away from work or a busy lifestyle
- Gain confidence and self-esteem
- Developing existing skills and knowledge
- Improving one's employment prospects
- Gaining an accreditation
- Using one's professional skills and knowledge to benefit others (usually described as pro bono).
- Meeting new people and making new friends
- A chance to socialize
- It's a good way to bridge the gap between yourself and others who may perceive you as “different”
- Volunteering sets a good example for others.
- Meeting like-minded, motivated, positive people is super easy.
- Volunteering creates empowerment.
- Volunteering gives greater perspective and self-awareness.
### Cohort Chart

<table>
<thead>
<tr>
<th>Traditionalists, Silent, Matures, Veterans</th>
<th>Leading Edge Boomers</th>
<th>Trailing Edge Boomers, Generation Jones</th>
<th>Generation-X</th>
<th>Millennials, Generation Y, Nexters</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Patriotism</td>
<td>• Prosperity</td>
<td>• Post-Vietnam College Experience</td>
<td>• Watergate</td>
<td>• Technology Boom</td>
</tr>
<tr>
<td>• Families</td>
<td>• Television</td>
<td>• Energy Crisis</td>
<td>• Nixon Resigns</td>
<td>• Oklahoma City Bombing &amp; 9-11</td>
</tr>
<tr>
<td>• The Great Depression</td>
<td>• Suburbia</td>
<td>• Economic Recession</td>
<td>• Latch Key Kids</td>
<td>• Multiculturalism</td>
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<tr>
<td>• WWII</td>
<td>• Assassinations</td>
<td>• Credit Cards</td>
<td>• Single Parent Homes</td>
<td>• Girls’ Movement</td>
</tr>
<tr>
<td>• Korean War</td>
<td>• Vietnam</td>
<td>• Big Debt</td>
<td>• MTV</td>
<td>• Harry Potter</td>
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<tr>
<td>• Golden Age of Radio</td>
<td>• Civil Rights</td>
<td>• Difficulty Starting Careers</td>
<td>• AIDS</td>
<td>• Schoolyard Violence</td>
</tr>
<tr>
<td>• Silver Screen</td>
<td>• Cold War</td>
<td>• Disco</td>
<td>• Computers</td>
<td>• Obama Elected</td>
</tr>
<tr>
<td>• Women’s Liberation</td>
<td>• The Space Race</td>
<td>• Live Aid</td>
<td>• Challenger Disaster</td>
<td></td>
</tr>
</tbody>
</table>
# Work Style Exercise Handout

## Work Environment
Consider:
- Attire
- Office surroundings
- Socializing on the job
- Telecommuting
- Privacy
- Perks (e.g., fitness center)
- Time flexibility

## Management Structure
Consider:
- Respect for the boss
- Adherence to the rules
- Involvement in decision-making
- Opportunity to suggest improvements
- Opportunities to exercise leadership
- Hierarchy

## Tasks and Job Design
Consider:
- Kind of work they like to do
- Use of technology
- Ability to use professional skills
- Working alone vs. in groups/teams
- Involvement in defining own job
- Seeing the outcomes of your work

## Motivations and Rewards
Consider:
- Duty vs. personal benefit
- Immediate vs. delayed reward
- Individual vs. group recognition
- Status and titles
- Token gifts
- Cash or cash-equivalent incentives
- Opportunities for professional development
# Changing Paradigm

<table>
<thead>
<tr>
<th></th>
<th>Traditionalist Paradigm</th>
<th>Boomer Paradigm</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Motivation</strong></td>
<td>• Civic duty</td>
<td>• Improve the world</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Find personal fulfillment</td>
</tr>
<tr>
<td><strong>Commitment Pattern</strong></td>
<td>• Long-term and regular</td>
<td>• More short-term and sporadic</td>
</tr>
<tr>
<td><strong>Management Style</strong></td>
<td>• Top-down, command &amp; control</td>
<td>• Consensus management</td>
</tr>
<tr>
<td></td>
<td>• Seen as subordinates</td>
<td>• Seen as partners; more collaboration</td>
</tr>
<tr>
<td><strong>Autonomy</strong></td>
<td>• Independent thinking or decision-making not encouraged</td>
<td>• More self-direction and involvement in decision-making</td>
</tr>
<tr>
<td><strong>Opportunities</strong></td>
<td>• Limited choice and flexibility</td>
<td>• Greater choice and flexibility</td>
</tr>
<tr>
<td></td>
<td>• Utilize basic skills</td>
<td>• Utilize a wide range of skills</td>
</tr>
<tr>
<td></td>
<td>• Roles defined by staff</td>
<td>• More involved in defining their roles</td>
</tr>
<tr>
<td><strong>Screening/Placement</strong></td>
<td>• Limited assessment of participants prior to placement</td>
<td>• More thorough assessment of participants</td>
</tr>
<tr>
<td></td>
<td>• Placement largely determined by organizational need</td>
<td>• Placement determined by both organizational and individual needs</td>
</tr>
<tr>
<td><strong>Relationship to the Organization</strong></td>
<td>• Strong identification</td>
<td>• Loose identification</td>
</tr>
<tr>
<td></td>
<td>• Conforming and loyal</td>
<td>• More individualistic and critical</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• More likely to leave if unsatisfied</td>
</tr>
<tr>
<td><strong>Expectation of Reward</strong></td>
<td>• Mostly group recognition</td>
<td>• More individualized recognition</td>
</tr>
<tr>
<td></td>
<td>• A “thank you” and sometimes expense reimbursement</td>
<td>• Incentives and opportunities for personal development</td>
</tr>
</tbody>
</table>
Organizational Needs Assessment Worksheet

Service to Individuals or the General Public

1. For what existing or new direct service opportunity would you like the help of people 50+?

Capacity Building

2. For what new opportunity providing support to you in managing the volunteer program would you like the help of people 50+?

- Coordinate volunteer recruitment
- Create recruitment materials
- Manage the program's social networking site
- Speak to community groups
- Conduct outreach at community events
- Interview and place volunteers

- Train volunteers
- Manage other volunteers
- Write a volunteer newsletter
- Research/develop new volunteer programs
- Create a survey
- Research/write grants
- Other
3. For what new opportunity providing support to management in administering the organization would you like the help of people 50+?

- Create/revise the mission
- Develop a strategic plan
- Serve on the board
- Conduct board development training
- Create a board manual
- Facilitate a board or staff retreat
- Review the organization's financial reports/processes
- Develop a succession plan with the ED
- Produce an annual report
- Provide staff training
- Create a staff orientation program
- Provide special event planning
- Create a logo or other branding
- Design printed materials
- Write copy for printed materials
- Create or improve a website
- Take photos or video
- Write grants
- Assess client needs
- Research and develop new programs
- Develop computer software
- Provide computer trouble shooting
- Conduct an energy or environmental audit
- Redesign an interior/landscape
- Provide a skilled trade
- Other

4. Based on the analysis you have now done, write the titles of two opportunities critical to your organization's mission that might be offered to a qualified person 50+. For each, rate the appeal you think the opportunity might have for boomers.

<table>
<thead>
<tr>
<th>Opportunity Title</th>
<th>Ranking of Appeal to Boomers</th>
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<tbody>
<tr>
<td>1.</td>
<td></td>
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<tr>
<td>2.</td>
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</table>
Tips on Engaging Capacity Building Volunteers

1. Get support of management.
   You need your Executive Director’s buy-in to start engaging capacity building volunteers and also his or her help in getting the cooperation of other managers in the organization. Remember that capacity building volunteers tend to work closely with managers, not frontline staff.

2. Compile a list of potential projects.
   Interview or survey your organization’s managers for their ideas of possible short-term, capacity building projects for volunteers. You don’t need a detailed job description at this point. Just clearly define the management challenge and skills that might be needed to solve it.

3. Recruit the right volunteer.
   Capacity building volunteers are often entrepreneurs. They like to take on projects and are energized by challenging goals. They may have been small business owners, project managers or administrators. Look for them at professional associations, corporate retiree groups, lifelong learning institutes and LinkedIn. Get their attention with messages such as “consultant needed,” “make use of professional skills,” and “work independently”.

4. Carefully review the volunteer’s qualifications.
   Before creating an opportunity for a capacity building volunteer, carefully evaluate their skill level. How many years have they used the skill? At what level did they use it: did they use it with supervision, independently or did they supervise or train others to use it? Do they have current licenses or certifications, if required? Have they had consulting experience?

5. Engage the appropriate organizational point person.
   Who in your organization came up with the idea for the project you have in mind for this volunteer? Ask them if they are willing to work with this volunteer. Be sure the project is still a priority for them and that they are able to devote the necessary time to working with a capacity building volunteer.

6. Assist the point person and the volunteer in creating a job description.
   Creating a job description for a capacity building volunteer should be a collaborative process where the volunteer assumes an equal role with staff in determining how the project will be carried out. In addition to the components found in a traditional job description, you should also include goals and objectives; action steps to be taken, required deliverables and a timeline.

7. Assist the point person and volunteer in establishing a communications plan.
   The point person is responsible for maintaining contact with the volunteer and monitoring his or her progress. How will this be done? Will the volunteer be required to attend staff meetings, submit formal reports or check-in occasionally through email or in-person?

8. Assist the point person in taking action if there are problems.
   The point person should notify the volunteer manager promptly if a capacity building volunteer fails to maintain communication, misses a deadline or performs poorly. Actions that might be taken include renegotiating the job description, corrective action, reassignment or ending the volunteer’s service.
# Opportunities Assessment

Place an “X” in each box where you currently offer opportunities.

<table>
<thead>
<tr>
<th></th>
<th>One-time</th>
<th></th>
<th>Occasional &amp; Short Term</th>
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<th>Regular, Ongoing</th>
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<tr>
<td></td>
<td>(e.g., one day only, days of service, fundraisers, special events)</td>
<td></td>
<td>(e.g., substitutes, on-call, seasonal or intensive projects)</td>
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<td>(e.g., daily, weekly or monthly)</td>
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<tr>
<td><strong>Direct Client Service</strong></td>
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<tr>
<td><strong>Indirect Client Service</strong></td>
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<td><strong>Advocacy</strong></td>
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<tr>
<td><strong>Administrative</strong></td>
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<tr>
<td><strong>Managerial &amp; Capacity Building</strong></td>
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<tr>
<td><strong>Governance</strong></td>
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**Direct Client Service**
- Face-to-face service, e.g., tutor, friendly visitor, meal deliverer.

**Indirect Client Service**
- Service that benefit clients without face-to-face contact, e.g., clothing sorter, food box packer, trail maintenance volunteer.

**Advocacy**
- Service toward social or governmental change, e.g., letter writer, public speaker, community organizer.

**Administrative**
- Service that supports the functioning of an organization: e.g., receptionist, data entry clerk.

**Managerial & Capacity Building**
- Supervising others, managing a program, technical or professional service that improves an organization, e.g., IT consultant

**Governance**
- Service involving organizational governance, e.g., board member or advisory council member.
Where to Go to Find People 50+

Listed below are a variety of potential places you can go to find people 50+. Some are the usual suspects; others are places you may not have tried before.

Recreational/Cultural
1. YMCA/YWCA/Gyms
2. Coffee shops
3. Libraries
4. Athletic leagues
5. Cultural Alliance
6. Golf/tennis/sports clubs
7. Flea markets
8. Local re-enactment groups
9. Recreation Centers

Health-Related
1. Doctors’ offices
2. Medicare workshops
3. Hospitals/health centers
4. Health fairs

Civic/Fraternial
1. Fraternal organizations (e.g., Rotary, Kiwanis, Lions)
2. Business and Professional Women
3. Fraternities/sororities (e.g., Alpha Kappa Alpha, Alpha Omega Alpha)

Aging Network
1. AARP chapters or state office
2. Professional retiree organizations (e.g., retired social workers, teachers, etc.)
3. Senior centers or senior clubs
4. Nutrition sites
5. Bereavement groups
6. RSVP (use as intermediary)
7. Community centers that have age 50+ classes and activities

Neighborhood/Community
1. Civic associations
2. Neighborhood clubs
3. Politicians’ offices
4. Libraries
5. Community agencies/bulletin boards
6. Schools
7. Township meetings
8. Grocery stores, drug stores, etc
9. Banks
Housing
1. NOHCs (Naturally Occurring Retirement Communities)
2. Senior residential housing/retirement communities
3. 50+ communities

Work-Place
1. Corporate pre-retirement groups
2. Agency training sessions or in-service meetings
3. Retiree meetings (retired teachers, postal workers, telephone workers, etc)
4. Unions
5. Chambers of commerce

Educational/ Religious
1. Faith-based institutions
2. Adult education classes
3. Alumni associations

Especially For Foreign-Born Older Adults
1. Senior Centers
2. Coffee and tea houses
3. Mosques, temples, and churches
4. Ethnic-based social service agencies
5. Ethnic grocery stores, pharmacies, restaurants

Internet
1. Craigslist, VolunteerMatch, Idealist.org, CreatetheGood.org, AllforGood.org
2. Linkedin.com
3. Facebook, Twitter
4. Your organization’s website

Other
1. Community newspapers
2. Press releases to the media
3. Grocery store bulletin boards
4. HR departments
5. Bring a friend to breakfast-gathering to introduce organization
6. ComingofAge.org
Overall Strategies for Recruiting People 50+

1. Work with intermediary organizations that will recruit and place volunteers or part-time staff with your organization.

Intermediaries need to understand the range of opportunities you are offering and have the capacity to make the appropriate matches. Here are some examples of intermediaries:

   1. Senior Corps (www.seniorcorps.org)
   2. Volunteer Centers (www.pointsoflight.org)
   3. Hands On Network (www.handsonnetwork.org)
   4. SCORE (www.score.org)
   5. Executive Service Corps (www.escus.org)
   6. Senior Community Service Employment Program (www.doleta.gov/seniors)
   7. Senior Centers (http://www.ncoa.org/…)
   8. Human Resource Coordinators at companies/non-profits (www.shrm.org)

2. Build strong partnerships with specific organizations in your community that have 50+ members (e.g., faith-based institutions, ethnic organizations, neighborhood associations, professional associations, senior housing developments/retirement communities).

3. Widely distribute recruitment materials in community.

4. ASK...ASK...ASK. Word of mouth is still the best way to recruit people to work in your organization.

Tips for Recruiting Specific Populations

50+ Men

- Affirm their experience and show how it can be used to help your organization. According to a national survey by Volunteer Match, “Men who are 55 and over are more likely than are other groups to believe that their skills matter.”

- Use terms such as “community work” or “contribution” rather than “volunteering.”

- Offer incentives, if possible, like sports tickets.

- Send older men as recruiters and use photos of older men in promotional materials.

- Target organizations that have primarily male membership like fraternities, the Masons, unions that represent the building trades, clubs for men at houses of worship, etc.
Limited English-Speaking People 50+

- Build authentic partnerships with trusted organizations and leaders in ethnic communities in order to reach older immigrants.

- Acknowledge and support informal civic activities in which older immigrants may already be engaged.

- Develop messages that reflect cultural motivations of older immigrants (e.g., desire to transmit culture, connection to community, faith, improved health) and promote sense of reciprocity/mutual aid.

- Help older immigrants and refugees identify their strengths and develop self-confidence.

- Engage groups of older immigrants in civic activities rather than recruiting individuals to work alone.

- Use bilingual staff to do outreach or engage interpreters.

- Make sure all materials are translated into native language.

Strategies for Recruiting People 50+ with Varying Abilities

- Show people with disabilities in promotional materials.

- Hold recruitment events and activities in accessible locations.

- Enhance access to your facility.

- Make use of adaptive technology.

- Offer compelling opportunities that can be done from home.

- Reach out to organizations in the community such as
  - Visiting Nurses Association
  - Meals on Wheels
  - United Cerebral Palsy
  - National Federation for the Blind

- Begin to build relationships and partnerships...
  - Exchange and get feedback on materials.
  - Co-create a strategy to recruit the target populations they serve.

- Before you start ...
  - Make sure you are ready to place volunteers with disabilities. For a self-evaluation to help you see if you are ready, go to the ServiceLeader website: www.serviceleader.org/new/virtual/index.

- For additional information and materials on engaging people with disabilities in service visit the National Service Inclusion Project website: www.serviceandinclusion.org.
Questions to Elicit Passion & Purpose

PASSIONS AND INTERESTS (answer at least one):

- What do/would I most enjoy spending time on?
- What did I like to do as a child/adolescent/young adult that I would like to revive? What childhood or later dreams have I put on hold?
- If I had unlimited money to spend in a bookstore (or a hobby-related store) what would I spend it on?

GIFTS, CAPABILITIES, ASSETS (answer at least one):

- Which of my Inborn talents/skills do I use with great enjoyment and ease?
- What capabilities or qualities am I most frequently praised for? What do people ask me to help them with or do for them?
- What assets do I bring from my life experiences and circumstances?
- What have I liked most and least about the jobs I have done in the past? What have I done best and enjoyed most in my work?

MISSION AND PURPOSE (answer at least one):

- What does my community/country/world most need?
- What makes me angry or what do I care strongly enough about to make me take action? (principles, causes, injustices, etc.)
- What personal tragedy, illness, or loss have I experienced that suggests how I might like to serve others?
- I have not yet accomplished/experienced/completed the following things in my life....

VALUES, PURPOSE (answer at least one):

- What sustains or nourishes me? What gives me energy/"juice"? Conversely, what drains my energy? (to be avoided)
- What is essential for my life to feel worthwhile?
- What are my fundamental beliefs and values?
- What experiences in my life have really made me “live”? What themes and patterns emerge?
- What would I want as my epitaph (or eulogy)?
- How would I spend my time if I had no financial constraints and could not fail? If I had six months to live? Three years?

GENERAL:

- If I could live 5 lives simultaneously with each expressing an important part of me, what would they be (leaving practicality and “shoulds” aside)? (Source: Barbara Sher)
- What has work meant to me? What positives do I want to keep and how will I keep them?

Adrienne Kizer, Volunteer Program Manager, attributes the success of the National WWI Museum and Memorial’s volunteer program to the following:

- NWWIMM has a compelling mission that allows for great and engaging topics.
- Many people have a passion for history but weren’t able to intertwine their interest with career. When people retire, they can pursue their personal interests, such as history.
- Excellent support system for volunteers through educational and volunteer training, security on premises 24/7, volunteer manager has an open door policy to promote two-way communication, thorough volunteer training, team leaders.
- Volunteers have some autonomy but also have a safety-net at the Museum and Memorial.
- Appreciation activities are done a few times a year.
- Variety of volunteer jobs that volunteers rotate so no one gets bored doing the same thing all shift.
- Success due to implementing the gold standard of volunteering
- FLEXIBLE SCHEDULING

Examples from Lynn’s Personal Experience
“VOLUNTEER VIEWPOINT”

If you want my loyalty, interests, and best efforts, remember that...

1. I need a SENSE OF BELONGING, a feeling that I am honestly needed for my total self, not just for my hands, nor because I take orders well.
2. I need to have a sense of sharing in planning our objectives. My need will be satisfied only when I feel that my ideas had a fair hearing.
3. I need to feel that the goals and objectives arrived at are within reach and that they make sense to me.
4. I need to feel that what I am doing has real purpose or contributes to human welfare - that its value extends even beyond my personal gain, or hours.
5. I need to share in making the rules by which, together, we shall live and work toward our goals.
6. I need to know in some clear detail just what is expected of me - not only my detailed task, but where I have opportunity to make personal and final decisions.
7. I need to have some responsibilities that challenge, that are within range of my abilities and interests, and that contribute toward reaching my assigned goal, and that cover all goals.
8. I need to see that progress is being made toward the goals we have set.
9. I need to be kept informed. What I am not up on, I may be down on. Keeping me informed is one way to give me status as an individual.
10. I need to have confidence in my superiors - confidence based upon assurance of consistent fair treatment, or recognition when it is due, and trust that loyalty will bring increased security.

In brief, it really doesn't matter how much sense my part in this organization makes to you - I must feel that the whole deal makes sense to me. I would add, hopefully the whole deal makes sense to everyone involved - the client, staff, volunteer... and you.
Ways to Volunteer

Involvement Opportunities for the National WWI Museum and Memorial

- Become a Museum and Memorial volunteer
- Assist with identifying prospects for the Pershing Legacy Society, capital campaign, or other giving opportunities.
- Co-host a Centennial Champion luncheon
- Work with development team on cultivating and thanking donors
- Get involved with the Museum’s Night at the Tower gala
- Discuss with individual his/her talents and skills and see how they may benefit the Museum
- Become a Business Roundtable Member
- Other
“Hands-on/ “In the Trenches”

Hours of Operation
Regular Hours: 10 a.m. - 5 p.m. (Tues. – Sun.)
Summer Hours (Daily, Memorial Day - Labor Day): 10 a.m. - 5 p.m. (Sun. – Fri.) 9 a.m. - 5 p.m. (Sat.)
Volunteer Normal Daily Operation Shifts (4 Hr. Shifts) – AM: 9:30 a.m. – 1:30 p.m./PM: 1:00 p.m. – 5:00 p.m.

Volunteer Positions
All Volunteers Start in Daily Operations:  
- Greeter  
- Bridge  
- Main Gallery (East/West/East Theater)  
- Halls (Memory/Exhibit)  
- Tower Operator/Ground Attendant  
- Guest Services  
- Wylie Gallery Greeter/Attendant

Other Volunteer Positions:  
- Special Events  
- Administrative (Reception/ Devo/Marketing)  
- Research Center  
- Interpretive Core (Museum Guides/Outreach)  
- VIPS (Volunteer in Protective Services)  
- Team Leader

Process to Become an Active Volunteer at the National WWI Museum
- Complete the online volunteer application and informal interview  
- Invitation to become a volunteer  
- Background Check  
- Volunteer Orientation – 4 hours  
- **Safety Awareness Training – 2-hour presentation plus a 1-hour tour (provided quarterly)  
- **Shadowing Team Leader Volunteers – 4 hours X 3 shifts (you choose days/times)  
- Become an Active Volunteer – you may now schedule your own volunteer time via our online scheduling program  
- We ask for your commitment to volunteer 8 hours per month or about 100 hours per year  
  **There is not a specific order to complete these requirements.

Dress Code
- Volunteers must purchase a minimum of one navy blue shirt – polo, short/long sleeved button down, or sweatshirt – they range in prices from $24 – 34 depending on the style and size  
- Khaki or Black Pants - women may also choose to wear Khaki or Black skirts  
- Red lanyard and security badge – Should receive during your first shadowing experience  
- Name Tag and pin representing # of hours volunteered – First one provided by the Museum (ordered after you become active)  
- Comfortable shoes – remember that you will be standing for long periods of time on hard floors

Volunteer Benefits – with Security ID
- Museum Store – 20% discount/ Over There Café – 25% discount  
- $10 Discount for our Brick Program and our Flag Program  
- Family Membership to the Museum after 100 hours of volunteer service during one calendar year  
- Annual Volunteer Appreciation Events throughout the year

6-6-18
Committees/Indirect

National WWI Museum and Memorial

Night at the Tower gala - Example 1

Chairmen and Committee Member Responsibilities

2019 Details

- Event date: Saturday, September 14, 2019 5:30 – 10:30 PM at the Museum.
- Eventology/Donna Thomason is the event planner.
- Theme and entertainment to be determined.

Honorary Chairs –The Bloch Family

- Attend event
- Provide guest list (opportunity for honorary chairs to invite their friends)
- Participate in promotional photos
- Assist in soliciting major contributors/sponsors for the event.
- Chairs will be part of all publicity, including listed on invitation and in program.
- Make a gift to support the event at one of the sponsorship levels.
- Ideally a connection with the Museum.

Honorary Chairmen History

- 2020 The Sunderland Family (September 12, 2020)
- 2019 The Bloch Family
- 2018 The Kemper Families
- 2017 The Hall Family
- 2016 The Dunn Family
- 2015 Anita and Gerald Gorman and Ollie and Arzelia Gates

Event Chairs

- Provide a comprehensive and coordinated offering for successful event
- Enhance and expand the image of the event to past and future supporters
- Appoint committee chairmen with assistance from Event Director and staff
- Benefactor letter signed by Chairs
- Assist in increasing attendance
- Motivate the staff and committee members to engage and participate
- Approval of all auction plans and items
- Send thank you letters to donors
- Oversee financial decisions
- Attend the August Committee Meeting for final presentation of all event elements
- Attend final post wrap up meeting if desired
- Discuss agreed upon GIVE/GET of sponsorship opportunities
- Serving on the next year's Night at the Tower sponsorship committee to assist with transition.
Event Chairmen History
- 2019 Greg & Deanna Graves and second couple pending
- 2018 Scott & Robin Boswell and Mike & Lisa Hagedorn
- 2017 Jeanette & Kevin Prenger
- 2016 Trudy & Jack Gabriel
- 2015 Evelyn Craft Belger & Trudy Gabriel

Host Committee Chairs
- Invite friends to event
- Participate in promotion photos.
- Identify and recruit people to be hosts and hostesses.
- Make a gift to support the event at one of the sponsorship levels.
- Agree to, as a minimum GIVE/GET at least one table sponsorship of $1500.00.

Host Committee
- Goal is to get 6 people to attend, or raise at least $1,500 worth of tickets.
- Hosts are encouraged to attend the event.
- Hosts will be listed in program.
- Attend initial committee meeting.
- Attend as many committee meetings as possible.
- Agree to, as a minimum GIVE/GET at least one table sponsorship of $1500.00.

Food & Beverage Chair
- Assist with building a food and beverage committee
- Work with Chairs, ED, staff and committee to prepare menus
- Provide event food and beverages with unique concepts and serving
- Work with ED and staff for logistical plans
- Purchase at least one (1) Benefactor level sponsorships.

Ambiance & Decoration Chair
- Assist with building an ambiance and décor committee
- Provide event ambiance and décor with unique concepts
- Share ideas and insights with Chairs, Event Director, staff, and committee
- Work with ED and staff for logistical plans
- Work with ED and catering company for food and beverage plans
- Work with ED and entertainment vendors
- Purchase at least one (1) Benefactor level sponsorships.

Entertainment and Logistics – TBD, Chair
- Assist with building an entertainment committee
- Work with event entertainment vendors for unique concepts
- Work with ED and staff for logistical plans
- Purchase at least one (1) Benefactor level sponsorships.
Sponsorship Chair
- Assist with building a sponsorship committee
- Help define sponsor benefits/levels
- Work directly with VP of Corporate Engagement, Chairs, and ED on sponsor list, solicitation and organization of asks.
- Assist VP of Corporate Engagement on collection of sponsor gifts (phone call follow up, thank you notes)
- Agree to GIVE/GET at least two (2) $2500.00 sponsorships.

Auction Chair
- Work directly with VP of Corporate Engagement, Chairs, and ED on sponsor list, solicitation and organization of asks.
- Assist VP of Corporate Engagement on collection of auction gifts
- Help prepare Auction list
- Take part in the selection process of digital auction program
- Purchase at least one (1) Benefactor level sponsorships.

Marketing, Public Relations and Collateral Chair
- Assist with building a marketing committee
- Share ideas and insights with Chairs, Event Director, staff, and committee
- Prepare PR list to target
- Prepare collateral list
- Work with Chair directly on overall theme, invitation and program design
- Help ED to ensure design and print deadlines are being met
- Purchase at least one (1) Benefactor level sponsorships.

Event Director and Manager – Donna Thomason
- Lead agenda for committee meetings
- Assist in recruiting committee members
- Liaison between staff and committee
- Establish reporting guidelines for committee and staff
- Assist Chair and staff with developing overall plan and goals
- Assist on opportunities for major revenue support, solicit corporate and personal sponsorships
- Develop, prepare and manage event timeline and deadlines
- Secure vendors. Prepare and maintain accurate records for contracts and budget
- Oversee marketing and event brand/design. Prepare marketing, media, & public awareness plan
- With ample time, provide chair with marketing material to be approved
- Prepare and manage event resume and run of show scripts
- Create ambiance description: from entrance to end of evening
- Develop, implement and manage coordination with staff and volunteers
- Assist with auction plans, logistics and items
- Oversee implantation of overall design and décor concepts
- Prepare and manage logistical plans for event, in coordination with museum staff.
- Provide at least $5,000 of in-kind services.

Contact
Debbie Bass, MPA, CFRE, VP Development | 816.888.8106 | dbass@theworldwar.org
3/8/2019 db
Committees/Indirect

Fundraising Campaign Job Descriptions - Example 2

Honorary Campaign Chair

The role of the honorary chair(s) of our campaign would be to lend expertise and experience to the fundraising effort. Because of the “honorary” nature of the post, the honorary chair(s) can be as involved as desired in any and all aspects of the campaign.

However, some important responsibilities of the position are to:
- Be a resource for identification of prospective donors
- Serve as a strategist on how to solicit gifts from appropriate donor prospects
- Give perspective to the campaign
- Serve as a community and national resource on information regarding the project
- Make a personal gift commitment to the campaign

Campaign Chair Job Description

By lending his or her name, reputation and stature to the National World War I campaign, the campaign chair endorses the initiative’s importance and attracts others of influence and affluence. He or she is passionate about the mission and outcomes of the Museum and inspires others through his or her commitment to the Museum’s ideals and impact.

In fulfillment of his or her role, the campaign chair should:
- Make a campaign leadership gift
- Identify prospective campaign cabinet members and donors whose influence and affluence will lend the campaign credibility and support
- Participate in the recruitment and solicitation of prospective campaign cabinet members and donors
- Be a positive ambassador for the organization and campaign
- Lead monthly campaign cabinet meetings

Campaign Cabinet Member Job Description

Members of the National World War I Museum Campaign Cabinet are integral to the organization’s ability to identify, qualify, cultivate and solicit prospects whose philanthropy will further the organization’s important mission. In fulfillment of their important roles, all campaign cabinet members should:
- Make a meaningful gift to the campaign
- Identify others who, with the proper education and cultivation, could make a meaningful gift to the campaign
- Participate, as appropriate, in the identification, qualification, cultivation, and solicitation of others
- Be a positive ambassador for the National World War I Museum and campaign
- Attend and participate in monthly campaign cabinet meetings, in person or remotely
Pershing Legacy Society Planned Giving
Steering Committee Guidelines - Example 3

BACKGROUND

The Pershing Legacy Society was founded in 2015 to recognize and thank donors who have placed the National World War I Museum and Memorial, aka Liberty Memorial Association, in their estate plans. There is no minimum or maximum amount to become a Pershing Legacy member. During the Centennial campaign (2014-2019), the Museum is seeking 100 Founding Members to make estate gifts to the Museum. Those who had placed the Museum in their estate plans prior to 2015 have been grandfathered in as Founding Members.

Pershing Legacy Members are highly valued and appreciated. The Museum realizes this is a very intentional and emotional decision to include the Museum in one’s estate. We are honored and humbled by this commitment. Members receive special benefits, which include being invited to VIP events and listed in the Museum’s annual report each year and donor wall. Pershing Legacy Members who make $100,000+ estate gift also receive a complimentary life-time membership to the Museum.

STEERING COMMITTEE GOALS

LEAD
• Utilize Steering Committee members expertise to guide planned giving efforts

GROW
• Contribute to museum’s annual revenue goals by securing new memberships for the Pershing Legacy Society
• Encourage current and former volunteers, board members, advisory board members, employees, Walk of Honor brick donors, Museum members, major donors, and founding families to place the Museum in their estate plans

COMMITTEE STRUCTURE

The Steering Committee is led by Steering Committee Chair. The Steering Committee should not exceed ten people.

LEADERSHIP DUTIES

Committee Members:
• Develop planned giving cultivation events and initiatives
• Where professionally qualified, provide initial consultation free to a potential planned giving member
• Identify and solicit potential planned giving members, as appropriate

Steering Committee Chair:
• “Champion” of the program and assists museum staff, as needed
• Attend and moderate steering committee meetings
• Serve a two-year term

TERMS

• Committee members serve a term of three (3) years beginning May 1. Members are allowed to renew for another three (3) year term.
• Chair serves a term of two (2) years beginning May 1
• If a member should be asked to co-chair the steering committee and his/her term is due to expire, his/her term may be extended a maximum of two (2) years.

GOVERNANCE

Chair selection: Appointed by museum staff in consultation with current chair
Committee member selection: Appointed by chair in consultation with staff
Retaining membership on committee: Members should strive to meet committee expectations listed under Leadership Duties

MEETINGS

• Steering Committee meetings take place one-two times annually. The meetings last approximately 1.5 hours; meetings to focus on Leadership Duties.
• The Museum will plan two-four one-hour presentations to potential planned giving donors each year.

ADMENDMENT

These guidelines may be amended by museum staff and Committee.

Adoption date

3/23/16 db
Signing Up with Get Connected


Step 1 – Create Your Account

Go to the Get Connected website listed above to begin by creating your account. Be sure to mark "Boomers Get Connected" when asked how you heard about the program.

Step 2 – Select Your Causes

Select the causes you want to be involved in for a more accurate volunteer opportunity list.

Step 3 – Select Your Interests

Select your skills and interests. Tell us how you would like to spend your time volunteering.

Step 4: - Select your non-profit agencies

Select the agencies that you’d like to get started volunteering with. Get Connected will create a list of non-profit partners and agencies that fit your interests.

Step 5 – Get Started

Verify your email address, and get started! You will be given a personalized Get Connected dashboard that allows you to track your upcoming events, see the dollar impact your volunteer work has made, track your volunteer hours, and access to countless volunteer opportunities near you.

If you have questions about Get Connected or would like someone from the Foundation to come to your organization to talk more about the initiative, please contact Rachael Watkins at watkins@thcf.org or by phone at 816-912-4185
What is Boomers Get Connected?

Boomers Get Connected is an initiative started in partnership with Truman Heartland Community Foundation and United Way of Greater Kansas City to help Baby Boomers find the best volunteer opportunities for them to help the communities they love.

With the interactive Get Connected website, users can register for a free account and find hundreds of volunteer opportunities in partnership with numerous non-profits serving Eastern Jackson County.

What makes Get Connected different from other volunteer websites?

Get Connected is a great resource for Baby Boomers coming into retirement who are still looking for ways to be involved! This is a local database, so your volunteer hours will be helping impact your immediate area and community.

Get Connected makes volunteering easier than ever. When you sign up with Get Connected, you’ll start receiving emails listing volunteer opportunities that fit your interests. Get Connected takes the work of searching, so you can spend more time making a positive impact and change.

Truman Heartland and United Way are working to make Get Connected the go-to volunteer database in the region. By joining us you’re choosing to be a part of a greater purpose and touch the lives of people in your community and beyond.

How do non-profits list their needs?

Truman Heartland and United Way of Greater Kansas City have done all the work of reaching out to the leaders of local non-profits to encourage their participation with Get Connected. Each agency is responsible for posting its volunteer opportunities from their own Get Connected accounts.

Does having a Get Connected account cost any money?

No. Get Connected is a free service offered to you by United Way as a means to make volunteering easier. The goal is to connect people like you with volunteer opportunities that excite you, while helping to make your local community a better place.