

Love Song - Sherv.NET

# Driving Member Engagement by Showing #VolunteerLove

**Jamie Gray**, MS, CVA, Project Management Institute | **Peggy Hoffman**, CAE,  
Mariner Management | **Jennifer Rowell**, North Carolina Association of CPAs

# A bit about me



Handle administration of volunteer recruitment system & other volunteer engagement tools

Staff Liaison for a volunteer committee which evaluates and recommends candidates to serve on five Board Support Committees.

I thought I was a multitasker before – but then I had three kids in 17 months and realized I had no idea what multitasking was! My son just turned 8 and my twin girls will be 7 in August.

In the free time I have, I enjoy sports and listening to live music.

**Jamie Gray, MS, CVA**

**Volunteer Services Specialist, Project Management Institute**

# A bit about me



Once known as the “chapter wrangler” and for a short stint as the “chapter killer,” I’ve happily evolved to the “chapter sun setter” because members are embracing the association’s new, flexible volunteering model.

When I’m not keeping up with my three kids, I like working out, gardening, and visiting with family in the North Carolina mountains.

**Jennifer Rowell, NCACPA Director of Member Engagement**

# A bit about me

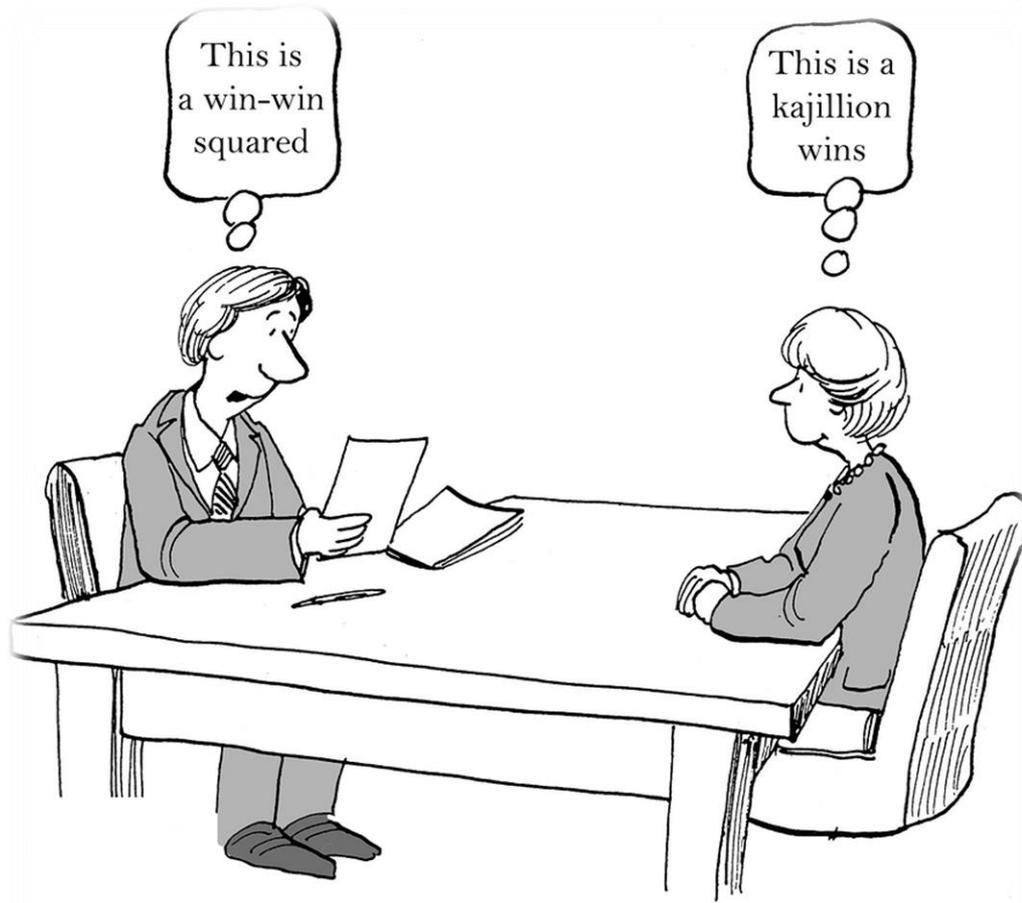


From PR pro to membership master to business owner – 25+ years in association management. Married my love of PR and association management as exec dir for PRSA Maryland.

When I'm not working and the weather's good, I'd be training for my next tri. Weather's bad? Catch me teaching spin or in dance class.

Ask me about the ASAE Foundation research project on mutually beneficial volunteering or innovating member engagement.

**Peggy Hoffman, CAE, Mariner Management**



“The agreement documents all look in order.”

# Variety

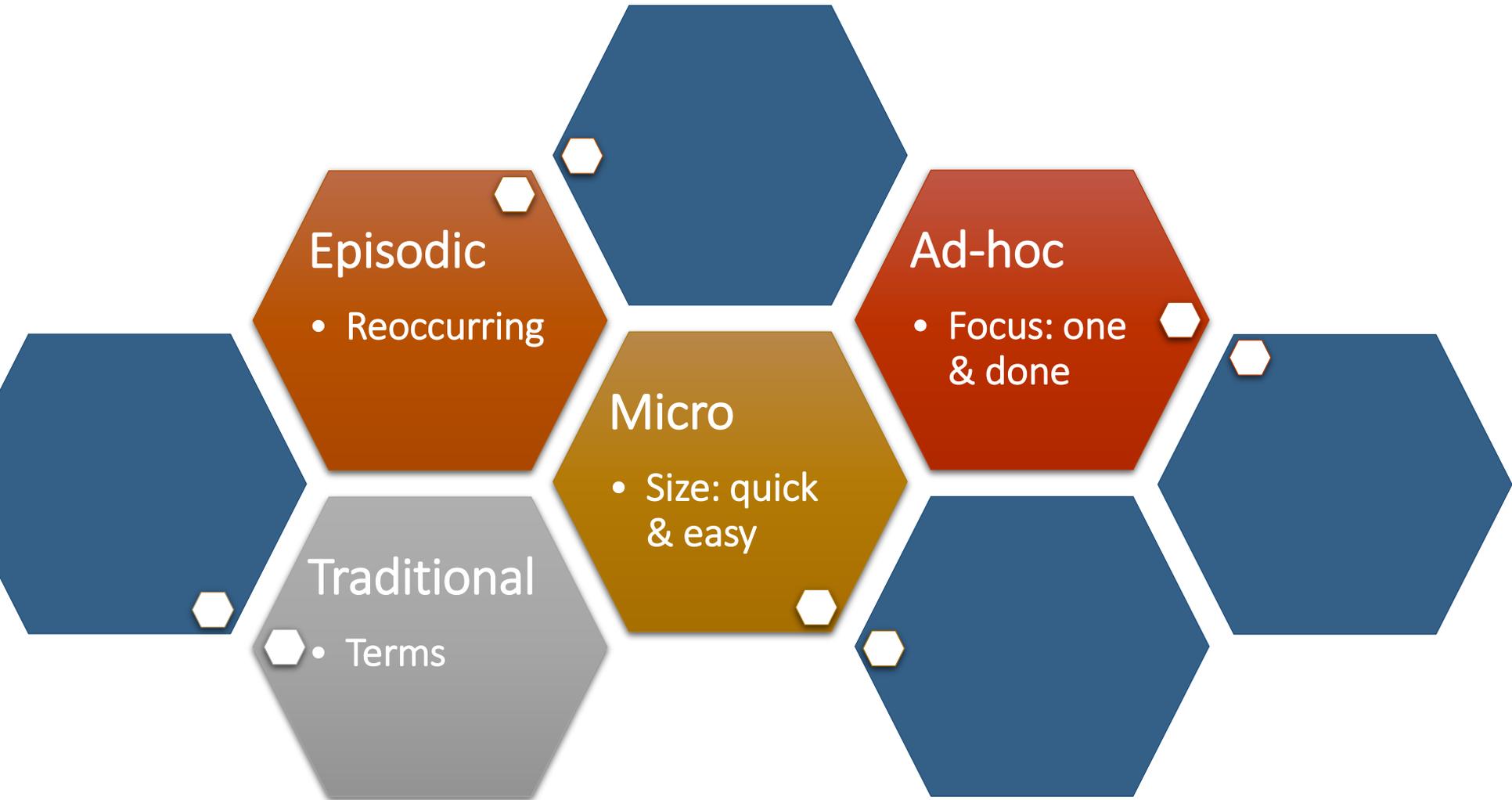
<opportunities, people>

# Support

<resources, training>

# Inclusive

<meets diverse individuals, needs>



What's in your mix?

↑ Membership loyalty (73%)

↙ Engagement of unseated volunteers

↘ Serving non-traditional members

# VOLUNTEER CONTINUUM



CONSUMING

viewing,  
reading,  
attending



PROMOTING

liking, sharing,  
recommending



CREATING

contributing,  
commenting,  
responding to  
surveys



SERVING

volunteering in  
non-governing  
role



GOVERNING

volunteering in  
a leadership  
role

- Eases people in
- Create volunteer lifecycle
- Supports collaboration

# Engaging Opportunities

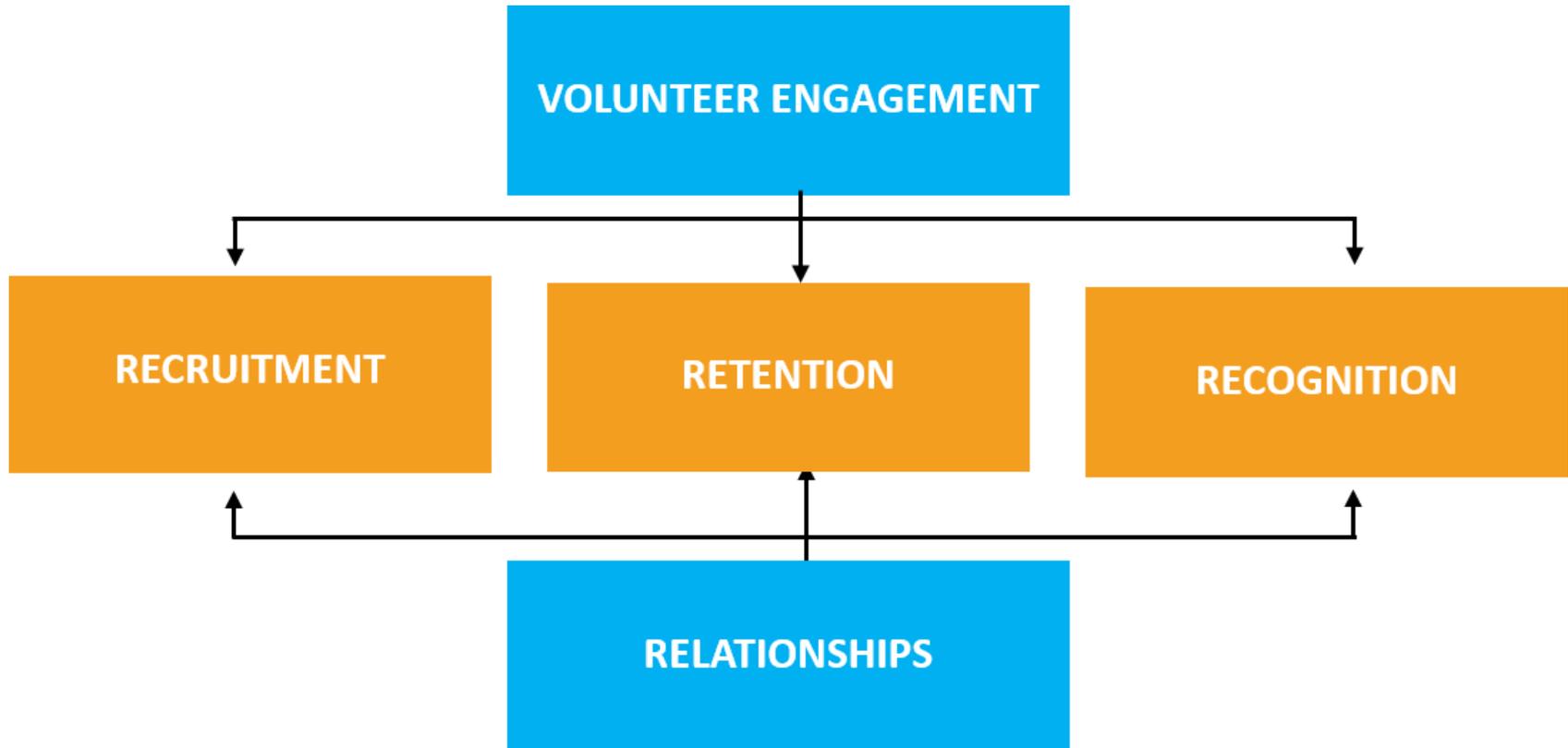


# My Member Community





# PMI's Volunteer Engagement Model



# PMI's Global Volunteer Roles

| GOC                        |                          |                               |                                |                    |                    |
|----------------------------|--------------------------|-------------------------------|--------------------------------|--------------------|--------------------|
| Strategic                  |                          | Operations                    | Individual Contributors        |                    |                    |
| ✓ Board of Directors       | ✓ Member Advisory Groups | ✓ PMI Awards Evaluator        | ✓ Student Project Team Advisor | ✓ Speaker          | ✓ Task Team Member |
| ✓ PMIEF Board              | ✓ Region Mentors         | ✓ Academic Programs Volunteer | ✓ Pilot Participant            | ✓ Content Reviewer |                    |
| ✓ Board Support Committees | ✓ Standards Committees   | ✓ PMI Publication Reviewer    | ✓ Student Competition Judge    | ✓ Exam Developer   |                    |

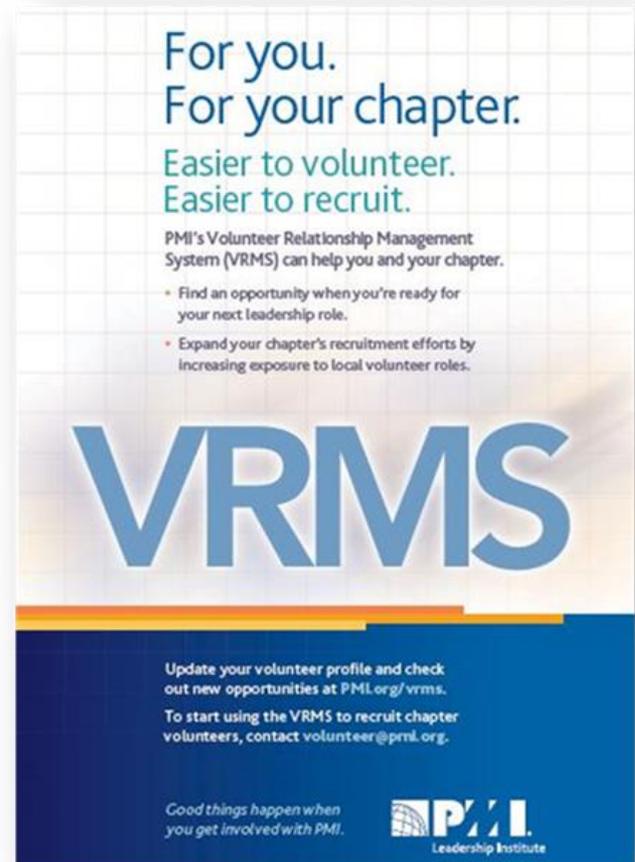
# Volunteer Relationship Management System Benefits

## For individuals:

- Easy: Single sign-on with PMI.org
- Automated: Get notified of new opportunities, maintain service history

## For chapters:

- Cost effective
- Exposure: PMI.org traffic = awareness of local opportunities
- Reports: Set subscriptions to receive reports on a regular basis



For you.  
For your chapter.  
Easier to volunteer.  
Easier to recruit.

PMI's Volunteer Relationship Management System (VRMS) can help you and your chapter.

- Find an opportunity when you're ready for your next leadership role.
- Expand your chapter's recruitment efforts by increasing exposure to local volunteer roles.

# VRMS

Update your volunteer profile and check out new opportunities at [PMI.org/vrms](http://PMI.org/vrms).  
To start using the VRMS to recruit chapter volunteers, contact [volunteer@pmi.org](mailto:volunteer@pmi.org).

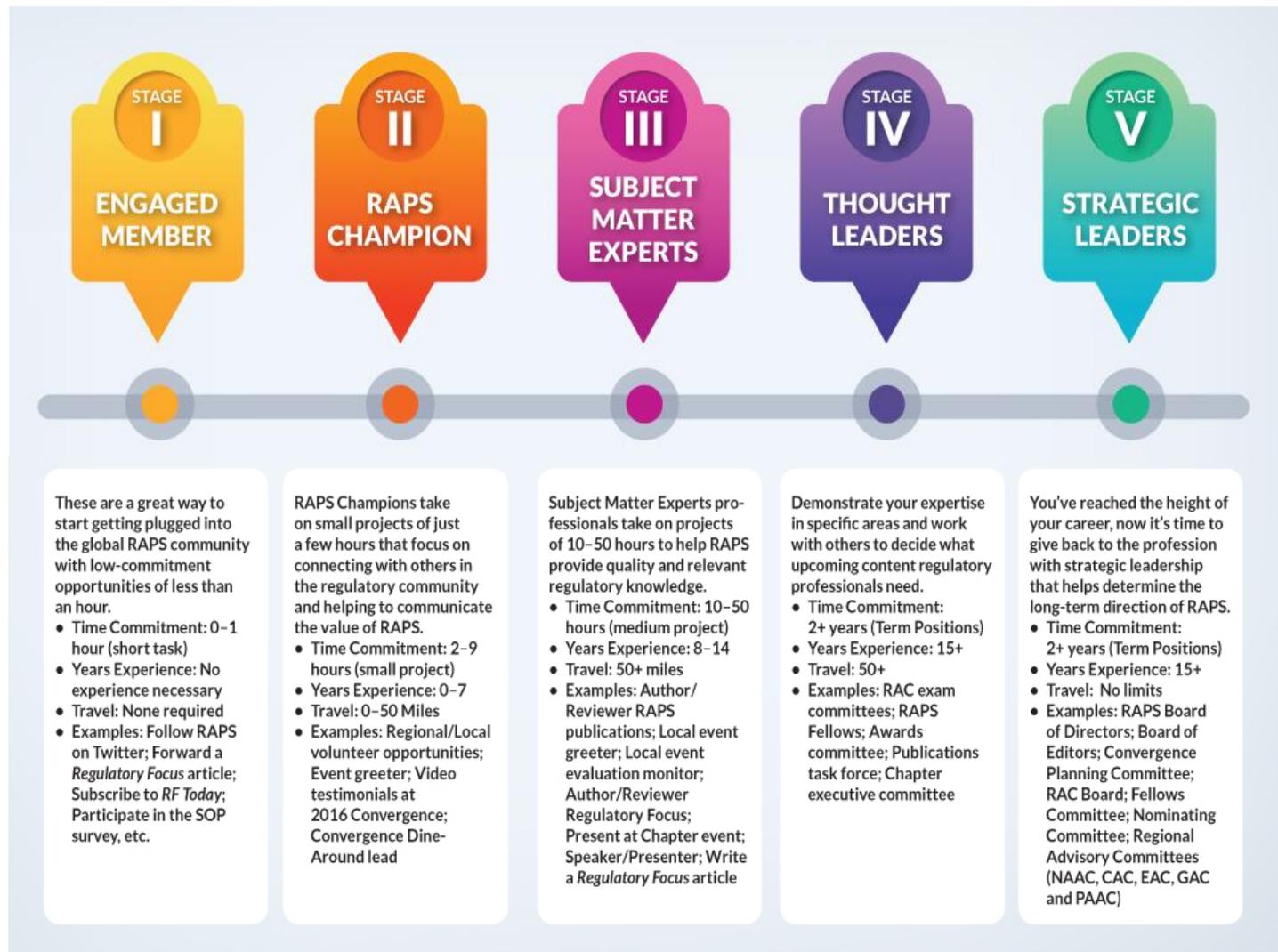
Good things happen when you get involved with PMI.



## VRMS by the Numbers

**776,000+ visits =**

| Manually Updated Profiles | Chapters Posted | Opportunities Posted | Applications Accepted |
|---------------------------|-----------------|----------------------|-----------------------|
| <b>69500</b>              | <b>165</b>      | <b>6800+</b>         | <b>14600</b>          |





North Carolina Association of Certified Public Accountants

# Connect

Home Profile Communities Directory Browse Participate Resources Mentoring Volunteer



Actions

## Contact Details

NCACPA  
PO Box 80188  
Raleigh, NC

Work: (919)469-1040 (138)  
Fax: (919)378-2000  
[jrowell@ncacpa.org](mailto:jrowell@ncacpa.org)

Ribbons

Member Engagement Team

NCACPA Staff



## Mrs. Jennifer Rowell

Director of Member Engagement, NCACPA

✉ 30 new messages

My Profile
My Connections
My Contributions
My Account
Admin

Invite me to volunteer when opportunities match my expertise?

### Volunteer Bio

Jennifer oversees the association's member engagement efforts. She is responsible for member relations, community outreach, and student recruitment efforts. She graduated from East Carolina University as a Pirate, but is also a Tar Heel fan. Jennifer enjoys spending time with her husband and their three children. One day she might discover a hobby or two, but for now her focus is her family!

### Willingness to Travel

Anywhere

### Years with NCACPA

7 - 10 Years as an NCACPA Member

+ Add Other Experiences

### Volunteer Interests

Annual Golf Tournament, Association Leadership, Content Creation, Diversity and Inclusion Efforts, Financial Literacy, Local Event Leaders, Local Scholarships, Meet-Ups, Networking Group Leaders, Social Networking Events, Speaking/Presenting, Student Outreach - Below High School, Student Outreach - College, Student Outreach - High School

### My NCACPA Volunteer Match Activity

Showing 1 of 1

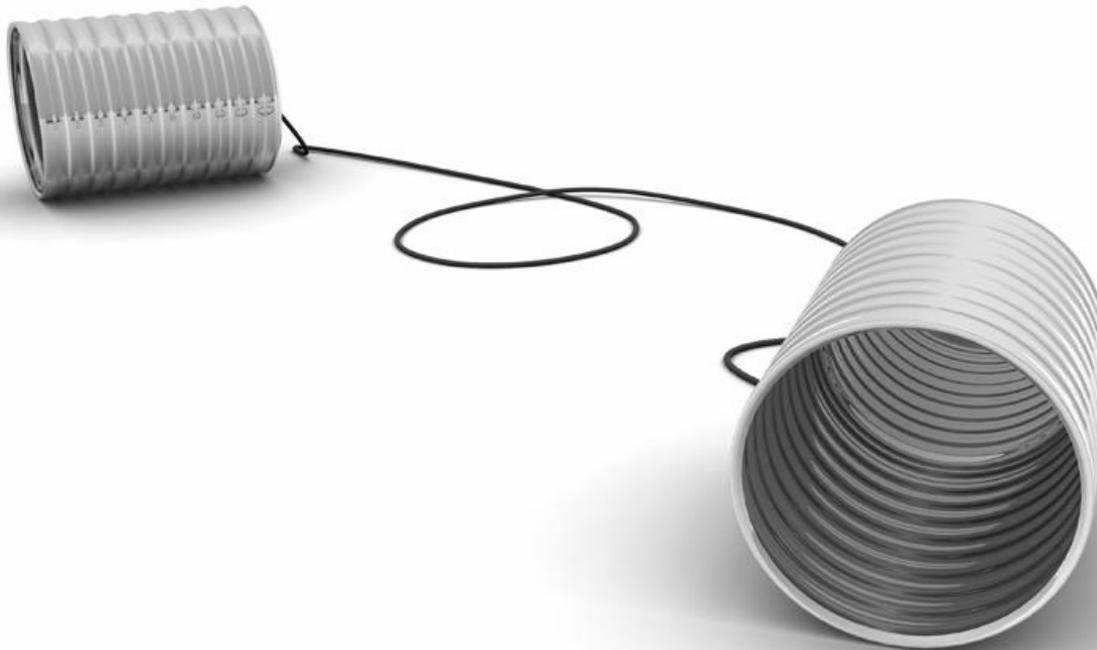
Show All

Volunteers needed for "Ask a CPA Day" in Asheville - 1/7/17

Starts: Saturday, January 7, 2017 Ends: Saturday, January 7, 2017 (points award pending)

Location: Online

# Communications





# Volunteer Service Excellence

Volunteers and effective volunteer partnerships with staff are the best way to accomplish the Institute's goals and objectives.

PMI Core Value, Strategic Plan (2011 rev.)

# Volunteer Engagement Toolkit



**Chapter Volunteer Engagement Toolkit**

**Retention**

**Volunteerism 101: Retention**

**VOLUNTEERS ARE MOTIVATED BY...**

- Opportunities to learn new skills
- Opportunities to "change the world"

**VOLUNTEERS STAY IN...**

- Their tasks and procedures are clear
- They feel welcomed and appreciated
- They bond to someone within the organization
- They receive feedback that connects their job to program success
- They have a voice in the organization

**What is retention?**  
Simply put, it's the ability to keep your volunteers engaged in your chapter by developing them for future volunteer roles and providing opportunities for leadership development.

As a volunteer yourself, you probably have a sense of why someone would volunteer in the first place. Think back to when you first decided to volunteer with PMI. What motivated you to get involved? We know that generally speaking our volunteers decide to get involved for 3 key reasons:

- Build a Professional Network
- Gain Skills and Experiences
- Develop as a Leader

*Training and ongoing learning is an important part of retention, and separate from a general orientation to the chapter and their volunteer role.*

**Recruitment**

**Volunteerism 101: Recruitment**

- Goal is to find work that is meaningful to both the volunteer and the organization
- Attracting volunteers begins with an organization's reputation, profile and mission
- Word-of-mouth, internet, live presentations, events and paid ads are top 5 recruitment methods
- Motivators include: values, understanding, personal development, community concern, and esteem enhancement

Recruitment, like everything in the volunteer engagement model, is based on relationships. The goal of recruitment is ultimately to find work that is meaningful to both the volunteer and the chapter. Recruitment starts before you even think about specific opportunities. It begins by building a "pipeline" of potential volunteers. Your membership is a great place to start; chapter events and meetings are always opportunities to talk to potential volunteers. Before you begin actively recruiting, the process starts with identifying the specific volunteer need and the resources to support the volunteer. Prior to active recruitment, your chapter will need to identify:

- The purpose of the volunteer opportunity
- The vision and goals of the volunteer opportunity
- How success will be measured
- Who the volunteer will report to

By answering these key questions, you will then be able to effectively create a specific job description for your volunteer opportunity.



**Recognition**

**Volunteerism 101: Recognition**

Above all, recognition should be timely and consistent. It doesn't have to be complicated or expensive.

In all aspects of our lives, we like to be recognized for the work we do. Volunteer recognition is no different. It comes in many forms, both formal and informal. You can probably think of several ways you personally would like to be recognized as a volunteer.

We know from Volunteer Satisfaction surveys that volunteers would most like to be recognized by receiving PDUs. Volunteers earn PDUs for their volunteer service, so one of their expectations is already being met! The first, and easiest way is to say thank you – and mean it. A simple thank you, on the phone, in person, or in email, goes a long way in making a volunteer feel appreciated. When thanking volunteers, it is important to give them context and explain exactly how they have contributed and the impact it has made to the chapter.

**PMI VOLUNTEERS HAVE ALSO TOLD US THAT THE FOLLOWING TYPES OF RECOGNITION ARE APPRECIATED:**

- Printed name in a PMI publication
- Receive a certificate or letter/email of appreciation
- Receive gifts, such as pmi, plaques, PMI shirts or books
- Volunteer team recognition dinner or banquet

**RESOURCES FOR YOU TO USE IN SUPPORT OF ONGOING VOLUNTEER RECOGNITION:**

- [Certificate of Appreciation](#)
- [Letter to Employer](#)
- [PDU Letter](#)
- [Holiday Letter](#)
- [Recognition Event Invite](#)

# Volunteer Communication/Resource Center



**FridayFacts**  
24 March 2017 Volume 10 Number 6

**Key Dates**

- 29 Mar ..... Free PDU Opportunity at PMI Member-Only Scheduling Virtual Event
- 30 Mar- ..... Region 13 Meeting – Punta del Este, Uruguay
- 1 Apr
- 31 Mar- ..... Region 1 Meeting – Eugene, OR
- 2 Apr
- 28–30 Apr ..... PMI® Leadership Institute Meeting 2017—EMEA, Rome, Italy

**Important Links**

- Chapter Leader Document Links
- Membership Marketing Materials

Tell your community and share through PMI networks!

**Strategic Announcement**

**PMI Strategy Update**  
Chapter Leaders: Get the latest PMI strategy update [here](#). Listen to Mike DeFrisco, vice president of Global Membership and Chapters, provide more details on what the strategy refresh means for PMI and the profession.

**Community News**

**Now Available: February Chapter Statistics**  
February chapter statistics are now available in the shared documents section of the Community Leadership site.

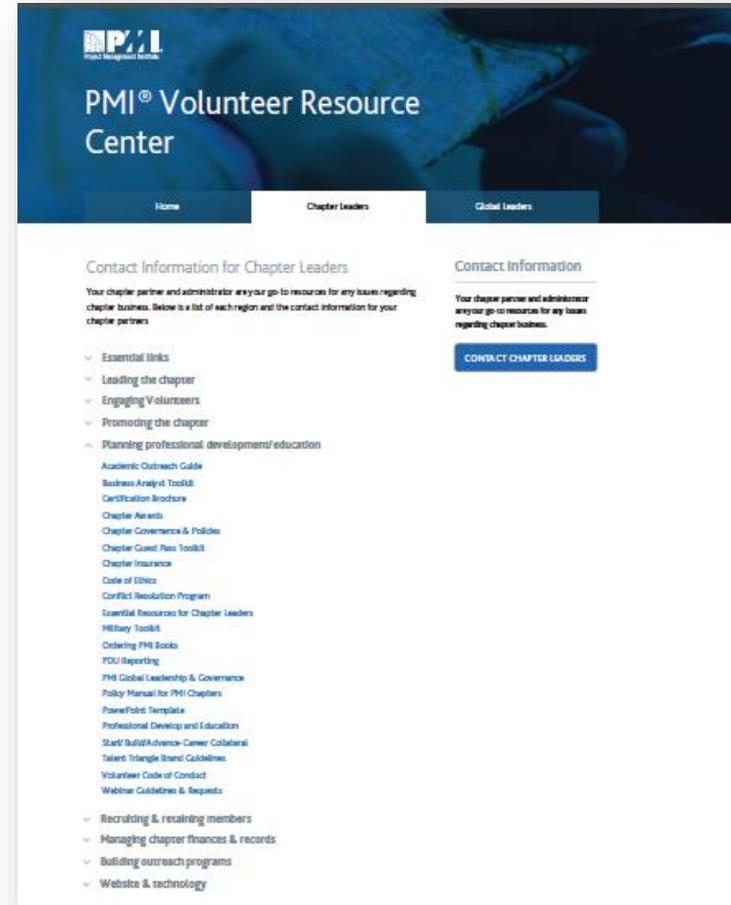
**2017 Chapter Awards Program**  
The PMI Chapter Awards Program provides recognition to chapters for their contributions toward achieving PMI's goals, and is based on quantitative data from the Chapter Reporting System. 2017 marks the second year of the refreshed Chapter Awards Program and we continue to look for ways to make the application process easier for qualified chapters to apply. [Learn More](#) about the Chapter Awards Program.

**Leadership Institute**

**Who is Presenting at PMI® Leadership Institute Meeting 2017—EMEA?**  
[Find out who among you will be presenting](#) at PMI® Leadership Institute Meeting 2017—EMEA. [Register today](#) and learn firsthand what your fellow chapter leaders are accomplishing all over the world. Book now, as discounted [hotel rates](#) expire 27 March and the [travel grant](#) deadline is 14 April 2017. See you in Rome, Italy.

**Register Today! Chapter Leader Orientation**  
Are you a new or experienced chapter leader? [Register today](#) for the Chapter Leader Orientation, a live, virtual event that will premiere Saturday, 20 May. This interactive learning experience will focus on areas every chapter leader needs to know regardless of role, plus will include role-specific sessions.

**Only Three Days Left! Proposals Needed**  
The submission deadline to present at the [PMI® Leadership Institute Meeting 2017—North America](#) is this Monday, 27 March. All presentation proposals should be focused and applicable to the skills, discipline and opportunities required to lead a chapter. For an example of a video that is needed with your submitted proposal, click [here](#).



**PMI® Volunteer Resource Center**

Home | Chapter Leaders | Global Leaders

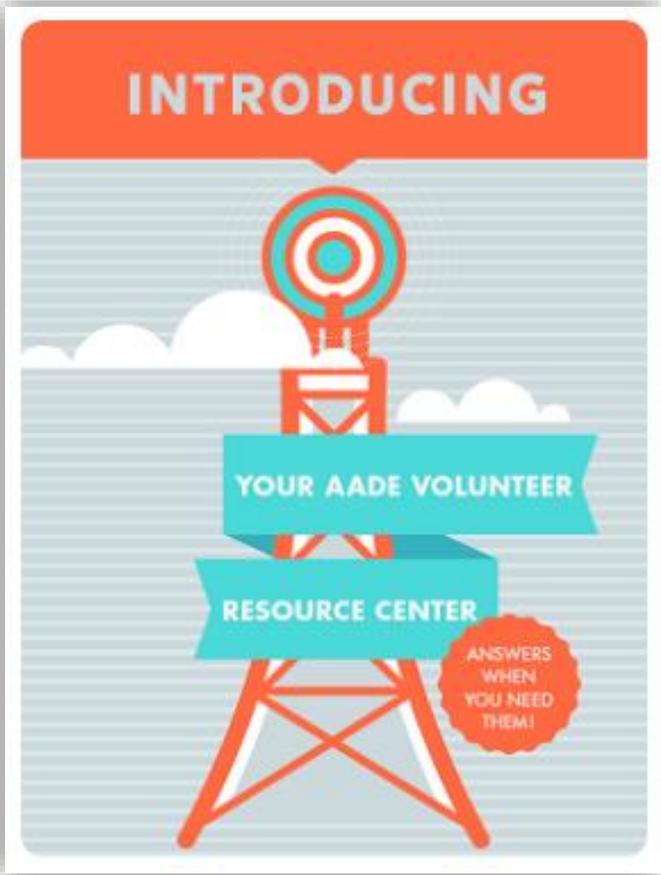
**Contact Information for Chapter Leaders**  
Your chapter partner and administrator are your go-to resources for any issues regarding chapter business. Below is a list of each region and the contact information for your chapter partner.

**Contact Information**  
Your chapter partner and administrator are your go-to resources for any issues regarding chapter business.

[CONTACT CHAPTER LEADERS](#)

- Essential links
- Leading the chapter
- Engaging Volunteers
- Promoting the chapter
- Planning professional development/education
- Academic Outreach Guide
- Business Analyst Toolkit
- Certification Brochure
- Chapter Awards
- Chapter Governance & Policies
- Chapter Guest Pass Toolkit
- Chapter Insurance
- Code of Ethics
- Conflict Resolution Program
- Essential Resources for Chapter Leaders
- Military Toolkit
- Ordering PMI Books
- PDU Reporting
- PMI Global Leadership & Governance
- Policy Manual for PMI Chapters
- PowerPoint Template
- Professional Develop and Education
- Start/Build/Advance Career Collaborate
- Talent Triangle Brand Guidelines
- Volunteer Code of Conduct
- Webinar Guidelines & Requests
- Recruiting & retaining members
- Managing chapter finances & records
- Building outreach programs
- Website & technology

# Volunteer Resource Center



## | VOLUNTEER RESOURCE CENTER |

Welcome to the MY AADE NETWORK Volunteer Resource Center. Whether you are new to AADE, or an experienced volunteer, this is your starting place for learning more about the tools and tactics that will help you successfully navigate your volunteer experience.



**ADMINISTRATION**

A to Z for MY AADE NETWORK web administrators.



**MOBILIZING VOLUNTEERS**

Recruiting, training and recognizing your volunteer workforce.



**LEADERSHIP**

The building blocks of visionary leadership.



**RUNNING YOUR GROUP**

What you need to know and do to have a successful group.



**EVENTS**

Planning, managing and promoting face-to-face and virtual events.



**MEMBERSHIP ENGAGEMENT**

How to connect and engage members.



**COMMUNICATIONS**

What, when and how to get messages to volunteers.



**VOLUNTEER LEADER NEWSLETTER**

Archives of the Volunteer Leader Newsletter.

# Leadership Summit Private Community

## LS16: 2016 Leadership Summit Settings

Community Home   Discussion 7   Library 1   Blogs 0   Members 97

### Announcements

Add Announcement Create a new announcement for display here.

Add Announcement

### Latest Discussion Posts Add

**Your help is needed: Board of Director nominations**

By: [Sharon Bryson](#), 3 months ago

I hope this message finds everyone enjoying their holiday season. Once we return from the hustle and bustle, it will be time to give serious thought to the future leaders of NCACPA! The association is officially accepting nominations for the next ...

### Latest Shared Files Add

**Your help is needed: Board nominees**

By: [Sharon Bryson](#), 3 months ago

**RE: Leadership Summit-conversation continues**

By: [Arthur Winstead](#), 6 months ago

**2016 Leadership Summit Presentation PDFs**

By: [Holly Bazemore](#), 6 months ago

PDF versions of the 2016 Leadership Summit Presentations

97 Members
24 per page

|                                   |                                    |                                    |                                    |  |                                      |
|-----------------------------------|------------------------------------|------------------------------------|------------------------------------|--|--------------------------------------|
| <br><a href="#">April Adams</a>   | <br><a href="#">Amin Anollabay</a> | <br><a href="#">Bessika Akar</a>   | <br><a href="#">Jonathan Allen</a> | <br><a href="#">Catherine Arden</a>      | <br><a href="#">Jackie Aschbaum</a>  |
| <br><a href="#">Susan Barrett</a> | <br><a href="#">Holly Bazemore</a> | <br><a href="#">Nicole Benford</a> | <br><a href="#">Andrea Boddie</a>  | <br><a href="#">Sandra Bretnschwerdt</a> | <br><a href="#">Sharon Bryson</a>    |
| <br><a href="#">Laurie Casler</a> | <br><a href="#">Rae Cochran</a>    | <br><a href="#">Scott Colston</a>  | <br><a href="#">Sabrina Cook</a>   | <br><a href="#">Laura Cowan</a>          | <br><a href="#">Victor D'Almeida</a> |

# Recognition



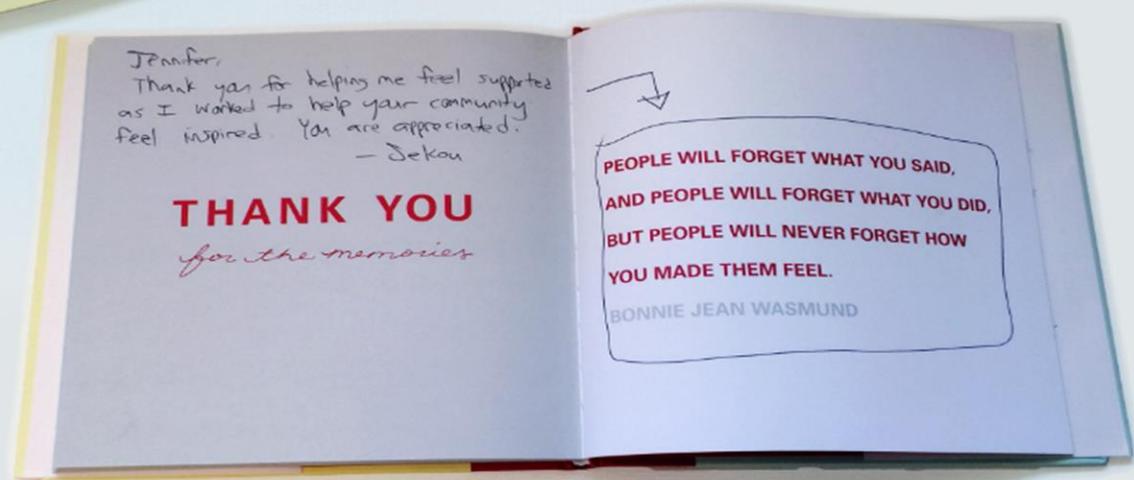
# Badges





North Carolina Association of  
Certified Public Accountants

# Gratitude Book



Jennifer,  
Thank you for helping me feel supported  
as I worked to help your community  
feel inspired. You are appreciated.  
- Jekou

**THANK YOU**  
*for the memories*

↓  
**PEOPLE WILL FORGET WHAT YOU SAID,  
AND PEOPLE WILL FORGET WHAT YOU DID,  
BUT PEOPLE WILL NEVER FORGET HOW  
YOU MADE THEM FEEL.**

BONNIE JEAN WASMUND



## The value of volunteering - 5 substantial incentives!

Published on December 19, 2016



Sascha Wyss, PgMP, PMP, PMI-ACP

Helping successful companies realise strategy aligned benefi...



152



23



17

A few days ago I received this certificate of recognition, for my volunteer work at PMI. I would like to thank Antonio Nieto-Rodriguez and Mark A. Langley for the certificate and for the opportunity to be a volunteer. Still, isn't it ironic - the biggest value you get out of joining an organization and paying a member fee is being allowed to work for free..... Absurd right?

This reaction I encounter a lot when mentioning that I volunteer and as chapter

**152 Likes!**  
**17 shares!**  
**23 Comments!**

# Leadership Institute Badges



In-person





# Contact Us

## **Jamie Gray, MS, CVA**

Volunteer Services Specialist | Project Management Institute  
610.356.4600 ext. 1157 | [JamieLynn.Gray@pmi.org](mailto:JamieLynn.Gray@pmi.org)

## **Peggy Hoffman, CAE**

President | Mariner Management  
301.725.2508 | [phoffman@marinermanagement.com](mailto:phoffman@marinermanagement.com)

## **Jennifer Rowell**

Director of Member Engagement | North Carolina Association of CPAs  
919.469.1040 ext. 138 | [jrowell@ncacpa.org](mailto:jrowell@ncacpa.org)

## DRIVING MEMBER ENGAGEMENT BY SHOWING #VOLUNTEERLOVE

### Association Snapshots & Take-Aways

**Association:** Project Management Institute

**Your Name:** Jamie Gray

**Title & Department:** Volunteer Services Specialist, Volunteer Programs & Services

**Website URL:** [www.pmi.org](http://www.pmi.org)

**Organization Structure:** Primarily an individual member organization

**Organization Scope:** Global

**Annual Revenue:** \$187M

**# Staff (FTE):** 400

**# Staff with formal responsibility for volunteer coordination/management:** 6 in department, approx. 15 others who manage committees/advisory groups

**# Members:** Individuals 478,000

**# Volunteers (approx.):** 8-10K

#### Types of Volunteering Offered:

- Ad-hoc/Micro
- Short Term/Task
- Traditional (committees, board)

#### *What do you regard as unique or important elements of your volunteer structure?*

PMI puts significant resources into volunteerism, and staff across the Institute interact with volunteers regularly. Because of the scope of our volunteer program and the overall member interest in volunteering on behalf of PMI Global, we are in the enviable position of have too many people and not enough slots. This means we are continually working towards providing more opportunities to get involved in different ways, and we are responsible for keeping people aware of opportunities at the local, chapter level. We have to creatively engage while always ensuring volunteer work is productive and meaningful for the individual volunteers and the organization.

#### *What are the 3-5 take-aways or tips from your presentation today?*

- Think outside the box to give people an opportunity to get their feet wet.
- But...even individual contributor/episodic volunteers have to be tracked so they can be recognized!
- Recognition doesn't have to be hard! Simple things can make a big difference.
- Your association's commitment to its volunteers has to be apparent

**Jamie Gray, MS, CVA** | 610.356.4600 ext 1157 | [JamieLynn.Gray@pmi.org](mailto:JamieLynn.Gray@pmi.org)

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**Association:** Mariner Management, An AMC supporting 3 state-based organizations

**Your Name:** Peggy Hoffman

**Title & Department:** President and executive director

**Website URL:** [www.marinermanagement.com](http://www.marinermanagement.com)

**Organization Structure:** AMC, 1 client is a trade association, 2 are professional associations

**Organization Scope:** Regional

**Annual Revenue:** Range \$50-150K

**# Staff (FTE):** 3

**# Staff with formal responsibility for volunteer coordination/management:** 2.5

**# Members:** Range 100-300

**# Volunteers (approx.):** Ranges from 1-5 to 1-20

**Types of Volunteering Offered:**

- Ad-hoc/Micro
- Short Term/Task
- Traditional (committees, board)

***What do you regard as unique or important elements of your volunteer structure?***

All three of our association volunteer programs focus on ad-hoc and episodic volunteering – we're constantly tweaking the system and the opportunities.

***What are the 3-5 take-aways or tips from your presentation today?***

- Think ACCESSIBLE volunteering which means leveraging different types of volunteering (micro, episodic, ad-hoc, traditional) + creating policies and procedures that offer flexibility (e.g., do you leverage technology for both how I sign-up, how I find opportunities and how I do the work).
- The essence of creating a mutually beneficial volunteer system (meaning is beneficial to the volunteer and the organization) is following a basic HR strategy that addresses job design, recruitment, selection, training & orientation, evaluation and reward & recognition.
- Reward results, recognize effort.

**Peggy Hoffman, CAE** | 301.725.2508 | [phoffman@marinermanagement.com](mailto:phoffman@marinermanagement.com)

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**Association:** North Carolina Association of CPAs

**Your Name:** Jennifer Rowell

**Title & Department:** Director of Member Engagement/Member Engagement

**Website URL:** [www.ncacpa.org](http://www.ncacpa.org)

**Organization Structure:** Individual membership organization

**Organization Scope:** North Carolina

**Annual Revenue:** \$8M

**# Staff (FTE):** 31

**# Staff with formal responsibility for volunteer coordination/management:** 4 full-time staff

**# Members:** 15,000

**# Volunteers (approx.):** 300 (ongoing volunteers)

**Types of Volunteering Offered:**

- Ad-hoc/Micro
- Short Term/Task
- Traditional (committees, board)

***What do you regard as unique or important elements of your volunteer structure?***

The way we interact with each other has changed immensely in the last few decades, and technology has enhanced our ability to communicate with each other frequently, easily, and without geographic barriers. For this reason, NCACPA is excited about its expansion from its geographic model to a more unified, collaborative community. In 2016, we transitioned from our chapter model and introduced My Member Community. A flexible, interest-based volunteer program allowing members to participate when they want, where they want, and how they want. My Member Community is made up of three models; Connect (our online community), Mentor Match (our mentor program), and Volunteer Match (our volunteer opportunities).

***What are the 3-5 take-aways or tips from your presentation today?***

- Provide flexible opportunities for members to volunteer based on their interests and schedules
- Recognize members through informal, automated ways such as ribbons and badging
- Even simple recognition such as gratitude books or certificates can go a long way
- Tell your volunteer story visually using video or other technology to bring members along
- Keep the volunteer conversation going through private communities or social media tools

**Jennifer Rowell** | 919.469.1040, Ext. 138 | [jrowell@ncacpa.org](mailto:jrowell@ncacpa.org)

**Sources On Association Membership And Volunteering (Read More!):**

*“The Decision To Volunteer: Why people give their time and how to engage the” and “10 Lessons for Cultivating Member Commitment”*, both available through ASAE, The Center for Association Leadership, [www.asaecenter.org](http://www.asaecenter.org).

*“When the Millennials Take Over”* by Jamie Notter and Maddie Grant, <http://www.culturethatworks.net>.

*The Mission Driven Volunteer*, by Elizabeth Engel, CAE and Peggy Hoffman, CAE, [bit.ly/13Wwe1F](http://bit.ly/13Wwe1F)

*You Say Ad Hoc, I Say Micro* by Mariner Management & Marketing, [bit.ly/1j3QetT](http://bit.ly/1j3QetT)

*Mutually Beneficial Volunteer System Report*, ASAE Foundation <http://bit.ly/2naRWx9>